

Concur Travel and Expense Roles

Roles determine a user's access to Concur Travel and Expense. This overview explains the purpose and scope of each role.

Recommended Best Practice:

Retain approval checks and balances with role assignments.

- Include as many individuals as practicable in the Request and Expense approval processes.
- Travel Admins and Supervisors cannot approve their own forms; Cost Center Approvers can approve their own forms.

Role	Responsibilities	Who Can Hold This Role?	For Which Traveler Types Can I Initiate?	For Which Traveler Types Can I Submit For Approval?	For Which Traveler Types Can I Approve?	How Do I Request This Role?
Employee Traveler	➤ Enter Travel Request for out of state or international travel and certain in-state travel at least one day before trip start date ➤ Book travel (air, hotel, train, or car rental) in Concur ➤ Gather receipts and enter Expense Report within 60 days of trip end date ➤ Review and Submit Requests and Expense Reports entered by travel delegates	Employee	Only yourself	Only yourself	None	All UMB Employees are assigned the Traveler role. No form is required.
Non-Employee Traveler	None	Non-Employee	None	None	None	Use the CITS "Concur User Authorization Form" (located on CITS Forms page)

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Traveler Delegate	➤ Act of behalf of Travelers ➤ Enter Request or Expense forms for employees ➤ Enter Request forms for Non-employees	Employee or Affiliate	Employee or Non-employee	Non-employee	None	Employee Traveler must assign this role to delegate or Use the CITS “ Concur User Authorization Form ” (located on CITS Forms page) for Non-employee Travelers
Travel Assistant/ Arranger	➤ Book travel (air, hotel, train, or car rental) in Concur on behalf of a traveler	Employee or Affiliate	Employee or Non-employee	None	None	Employee Traveler must assign this role
Primary Travel Administrator (PTA)	➤ Validate that all Request and Expense items comply with UMB Travel Policy. ➤ Approve, Return, Upload or Comment on Request and/or Expense Forms ➤ Assign Travel Administrator delegates to perform all actions of PTA	Employee or Affiliate	None	None	Employee or Non-employee	Use the CITS “ Concur Primary Travel Administrator Form ” (located on CITS Forms page) and specify Orgs
Travel Administrator Delegate (TAD)	➤ Act of behalf of PTA ➤ Validate that all Request and Expense items comply with UMB Travel Policy. ➤ Approve, Return, Upload or Comment on Request and/or Expense Forms	Employee or Affiliate	None	None	Employee or Non-employee	➤ Use the CITS “Concur User Authorization Form” (located on CITS Forms page) ➤ PTA must assign this role to delegate

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Travel Supervisor (TS)	➤ Acknowledge an Employee's request to travel on behalf of the University. ➤ Approve, Return, Upload or Comment on Request and/or Expense Forms ➤ Assign Travel Supervisor delegates to perform all actions of Travel Supervisor	Employee or Affiliate	None	None	Employee	Interfaced from HRMS timesheet set up table. No form is required.
Travel Supervisor Delegate (TSD)	➤ Act of behalf of TS ➤ Acknowledge an Employee's request to travel on behalf of the University. ➤ Approve, Return, Upload or Comment on Request and/or Expense Forms	Employee or Affiliate	None	None	Employee	➤ Use the CITS "Concur User Authorization Form" (located on CITS Forms page) ➤ TS must assign this role to delegate
Primary Cost Center Approver (PCCA)	➤ Authorize expenditures to the funding sources that support the travel ➤ Certify that all travel expenses adhere to the current UM Travel Policy. ➤ Approve, Return, Upload or Comment on financial expenditures related to the Request and/or Expense Forms.	Employee or Affiliate	None	None	Employee or Non-employee	Use the CITS "Concur Primary Cost Center Approver Form" (located on CITS Forms page) and specify Orgs

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Cost Center Approver Delegate (CCAD)	➤ Act of behalf of PCCA ➤ Authorize expenditures to the funding sources that support the travel ➤ Approve, Return, Upload or Comment on financial expenditures related to the Request and/or Expense Forms.	Employee or Affiliate	None	None	Employee or Non-employee	➤ Use the CITS "Concur User Authorization Form" (located on CITS Forms page) ➤ PCCA must assign this role to delegate