Delegates and Travel Assistants/Arrangers

There are two different types of access a traveler can grant to another user within Concur. A user can be assigned to both roles by the traveler directly in their profile. A Delegate cannot assign oneself as someone else’s Delegate or Arranger.

- **Delegate (Request/Expense):** Assists with the Request and/or Expense Report documents.
- **Travel Assistant/Arranger:** Assists with Booking Travel.

**NOTE:** If you are a Delegate, you can access the Request and Expense tabs, if you are a Travel Assistant/Arranger, you can access the Travel tab. If you are both a Delegate and a Travel Assistant/Arranger, you can access the Request, Expense, and Travel tabs. If you have been designated as a Delegate who can approve on behalf of this person, you may also see an Approvals tab.

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Delegates and Travel Assistants/Arrangers

Assign Request & Expense Delegate

A person assigned as a **Request/Expense Delegate** can perform Request and/or Expense duties on a traveler’s behalf based on the checkboxes selected during the following process, including approvals. Only the **profiled traveler** can assign this access to another user.

1. Start at the **Concur Homepage**, select the circle with your initials > Profile Settings.

   ![Exhibit 1](image1)

2. On the left side navigation bar, locate **Request Settings** from the list and select **Request Delegates**. You may also select **Expense Delegates** and it will update in both places.

   ![Exhibit 2](image2)

   NOTE: Request and Expense delegates functions are **shared**.

3. Select Add to include additional people who can perform Request/Expense functions on the traveler’s behalf. Enter the user’s name and select the appropriate user from the available options. Select Add.

   ![Exhibit 3](image3)
4. Select the appropriate checkboxes for this person to be able to perform on the traveler’s behalf >Save.

- **Can Prepare**: Allows a Delegate to prepare a Request and/or Expense Report on a traveler’s behalf. This does not allow them to submit those documents on a traveler’s behalf. These users get a “Ready for Review” button instead of a “Submit” button (unless “Can Submit Requests” is selected).
- **Can Submit Requests**: Allows a Delegate to prepare and submit a Request document on a traveler’s behalf.
- **Can View Receipts**: Allows a Delegate to see receipt images in a traveler’s Expense tab.
- **Receives Emails**: If selected, a Delegate will receive all emails related to a traveler’s Requests/Expense Report. **Example**: If a Request/Expense is sent back for changes, both the Delegate and Traveler will be notified via email.
- **Can Approve**: Allows a Delegate to approve anything on a traveler’s behalf. For a Fiscal Officer or a Department Approver, the Delegate will be able to approve anything that is sent to you for approval.
- **Can Approve Temporary**: Allows a Delegate to approve anything on a traveler’s behalf during a time frame.
- **Can Preview for Approver**: Allows a Delegate to review a Request and/or Expense Report prior to a traveler’s approval. This does not allow them to approve those documents on a traveler’s behalf. These users get a “Ready for Review” button instead of a “Approve” button (unless “Can Approve” access is granted).
- **Receives Approval Emails**: If selected, a Delegate will receive all emails that an approver would receive. If a request/expense arrives for approval, the Delegate as well as the approver will be notified via email.
Remove Request & Expense Delegate

1. To delete your Delegates or who you Delegate For, locate the name noted in the box that is to be removed and click the checkbox to the left of their name. Select Delete.

2. Confirm you would like to delete this user from performing Request/Expense functions on the traveler’s behalf. You may also amend access at any time by selecting or un-selecting checkboxes for the delegate and selecting the Save button.
Delegates and Travel Assistants/Arrangers

Assign Travel Assistant/Arranger

A person assigned as a Travel Assistant/Arranger can book travel in Concur on a traveler’s behalf or see their trip library. Only the traveler can assign this access to another user.

1. Start at the Concur Homepage, select the circle with your initials > Profile Settings.

2. On the left side navigation bar, locate the Travel Settings and select Assistants/Arrangers.

3. Select Add an Assistant to add additional people who can perform Travel functions on the traveler’s behalf.

4. Start typing the individual’s name and select the appropriate user from the options. Choose the checkboxes based on the traveler’s needs and select Save.
Remove a Travel Assistant/Arranger

1. To delete your Travel Assistants/Arrangers, locate the Travel Settings on the left side navigation bar and select Assistants/Arrangers.

2. Establish the name noted in the box that is to be removed and click the Trash Can > Save.

3. To delete who you are a Travel Assistant/Arranger for, locate the Travel Settings on the left side navigation bar and select I’m Assisting...

4. Establish the name noted in the box that is to be removed and click the Trash Can.
Act as a Request & Expense Delegate

1. Start at the Concur Homepage, select Profile > Act as Another User > A Delegate for another user who has granted you this permission > Enter the individual's name or NetID in Search by Name or ID field.

NOTE: You will only be able to locate those individuals who have identified you as a Delegate. If the user you are attempting to Delegate for is not a listed option, please contact the user and request them to add you as a Delegate.

2. Select the individual's name from pull-down list. Select Switch.

NOTE: User Bar should display Individual's Name.
3. When submitting a request, there are two different policies to choose from: **Profiled Traveler Policy** and **Non Profiled Traveler Policy**. Select **Profiled Traveler Policy** if the person traveling is an MSU employee (faculty, staff, or student employee) or select **Non Profiled Traveler Policy** if the person traveling is a guest of MSU or a student who is not employed by MSU.

**NOTE:** The combination of the policy chosen and the person identified in the Profile will determine who will receive any travel reimbursement processed in the request.

- If I am logged in as myself and choose **Profiled Traveler Policy**, and reimbursement processed in the request will pay me.
- If I am acting on behalf of another employee and choose **Profiled Traveler Policy**, any reimbursement processed in the request will pay the traveler it is being prepared for.
- If I am logged in as myself or acting on behalf of another employee and choose **Non Profiled Traveler Policy**, any reimbursement processed will ask for a KFS Vendor ID to pay the guest.
Delegates and Travel Assistants/Arrangers

Act as a Travel Assistant/Arranger

1. Start at the Concur Homepage, select Profile > Act as Another User >
   Enter the individual’s name or NetID in Search by Name or ID field. NOTE: User Bar should display Individual’s Name.

2. Select the individual’s name from pull-down list. Select Switch.

NOTE: You will only be able to locate those individuals who have identified you as a Travel Assistant/Arranger. If the user you are attempting to Book Travel for is not a listed option, please contact the user and request them to add you as a Travel Assistant/Arranger.

NOTE: User Bar should display Individual’s Name.