# 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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## 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.

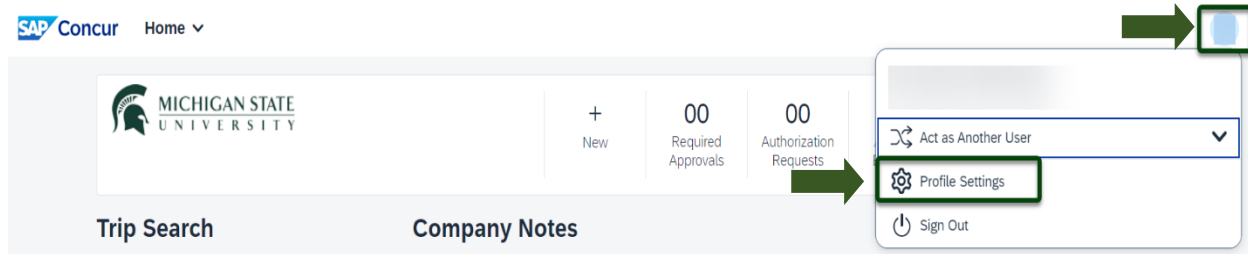1. Start at the **Concur Homepage**, select **the circle with your initials** >**Profile Settings**.

*Exhibit 1*

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.
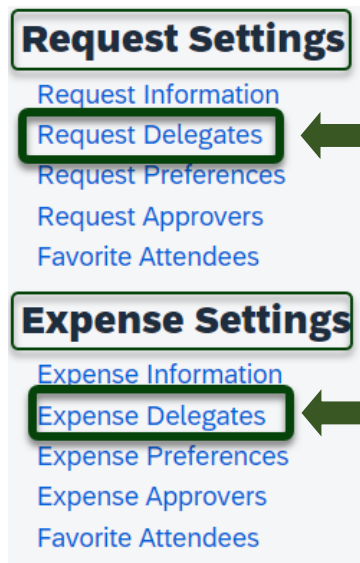
NOTE: Request and Expense delegates functions are shared.

*Exhibit 2*

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**.
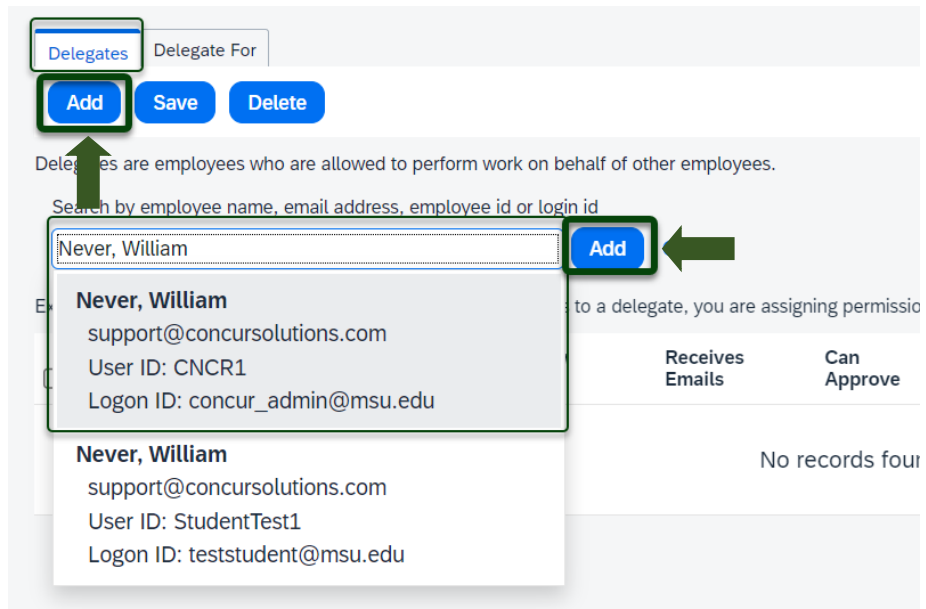
Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Never, William

**Never, William**
support@concursolutions.com
User ID: CNCR1
Logon ID: concur_admin@msu.edu

**Never, William**
support@concursolutions.com
User ID: StudentTest1
Logon ID: teststudent@msu.edu

Receives Emails

Can Approve

No records fou

*Exhibit 3*

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# Delegates and Travel Assistants/Arrangers

4. **Select** the appropriate checkboxes for this person to be able to perform on the traveler's behalf >**Save**.



*Exhibit 3*

- **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.

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## 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**.



*Exhibit 5*

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.



*Exhibit 6*

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## 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**.
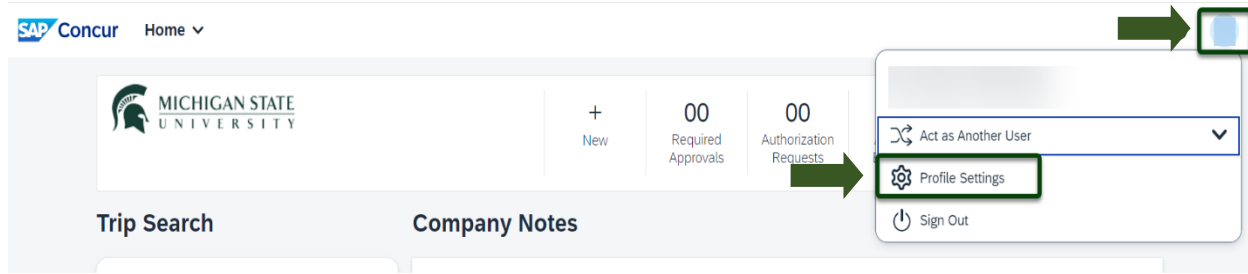
*Exhibit 7*

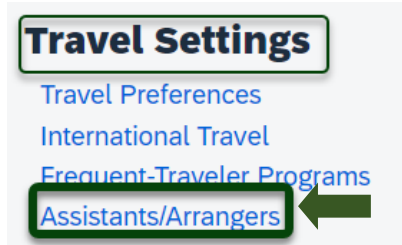2. On the left side navigation bar, locate the Travel Settings and select **Assistants/Arrangers**.

**Travel Settings**

Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers

*Exhibit 8*

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

**Assistants and Travel Arrangers**                    Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.
☐ Refuse Self Assigning Assistants ⦿

Your Assistants and Travel Arrangers                    ⊕ Add an Assistant

You currently have no assistants defined.
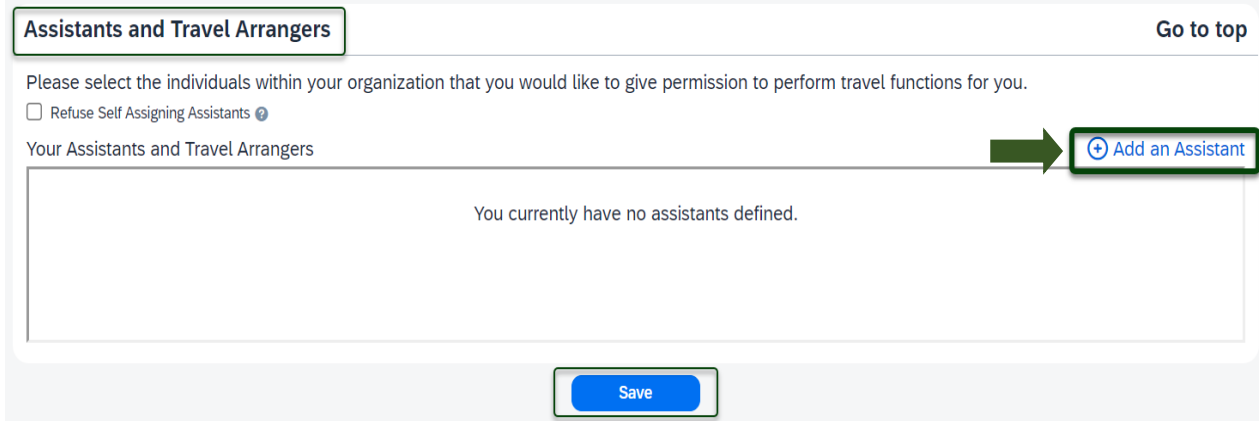
Save

*Exhibit 9*

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**.

**Add an Assistant - Google Chrome**   —  □  ✕
🔒 us2.concursolutions.com/profile/AssistantEditor.asp...

**Add an Assistant**

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant
Never, William
☑ Can book travel for me
☑ Is my primary assistant for travel*

*Individuals/Groups with **no work phone number in their profile** cannot be designated as primary assistant for travel.

Save        Cancel

*Exhibit 10*

# Delegates and Travel Assistants/Arrangers
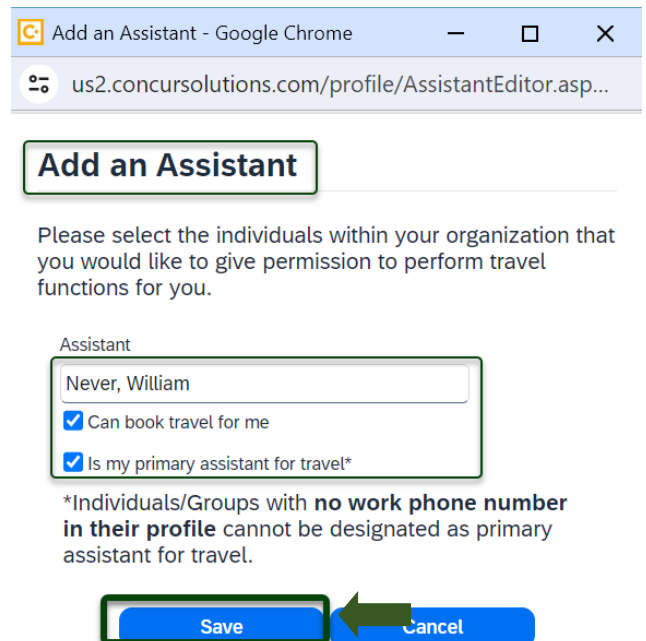
## Remove a Travel Assistant/Arranger

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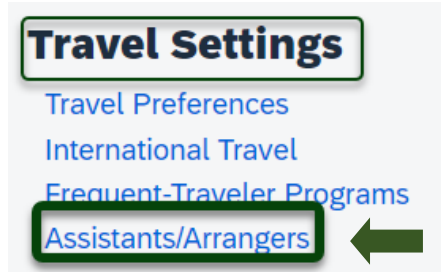
**Travel Settings**

Travel Preferences

International Travel

Frequent-Traveler Programs

Assistants/Arrangers ←

*Exhibit 11*

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

**Assistants and Travel Arrangers**                    Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

☐ Refuse Self Assigning Assistants ❓

Your Assistants and Travel Arrangers                                      ⊕ Add an Assistant

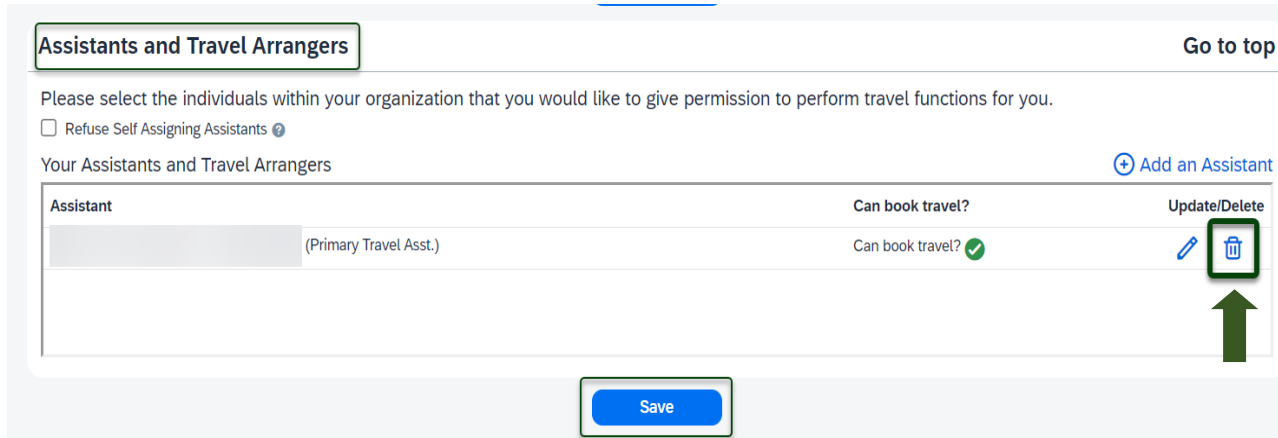| Assistant | | Can book travel? | Update/Delete |
|---|---|---|---|
| | (Primary Travel Asst.) | Can book travel? ✅ | ✏️ 🗑️ |

Save

*Exhibit 12*

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...**
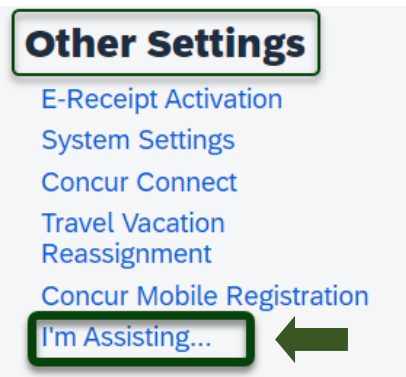
**Other Settings**

E-Receipt Activation

System Settings

Concur Connect

Travel Vacation Reassignment

Concur Mobile Registration

I'm Assisting... ←

*Exhibit 13*

4. Establish the name noted in the box that is to be removed and click the **Trash Can.**

**I'm Assisting...**

You are currently assigned as an assistant for the following people:

**Find a user**

Username [_____] Can book travel? ☐ Add / Update

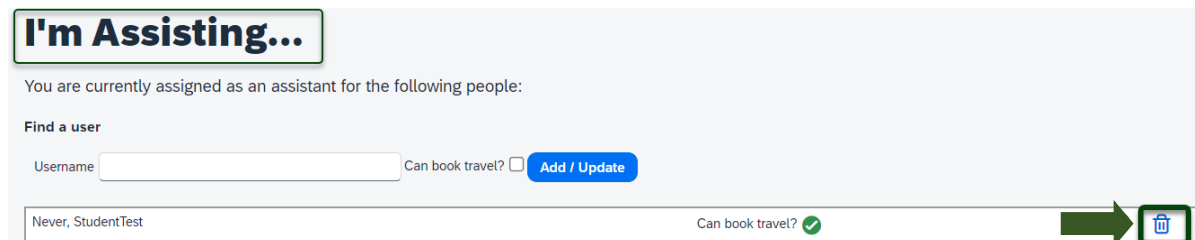| Never, StudentTest | Can book travel? ✅ | → 🗑️ |

*Exhibit 14*

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🏈 TRAVEL@STATE

## 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** >
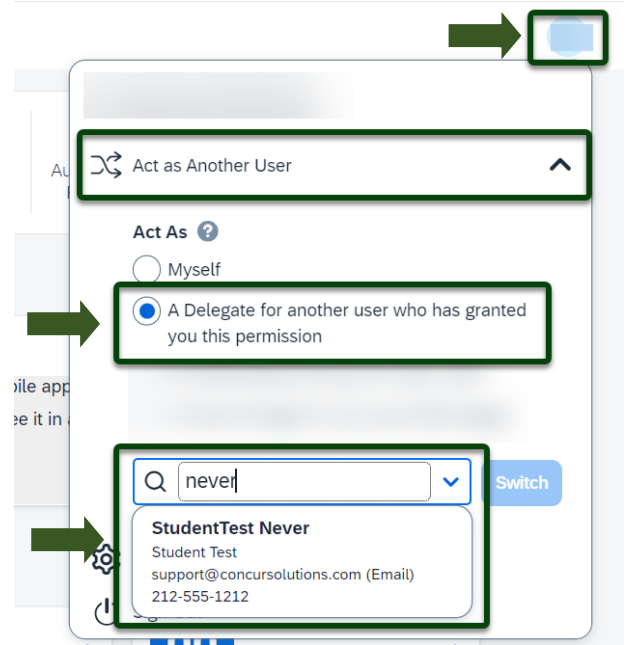Enter the individual's name or NetID in **Search by Name or ID** field.



*Exhibit 45*

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
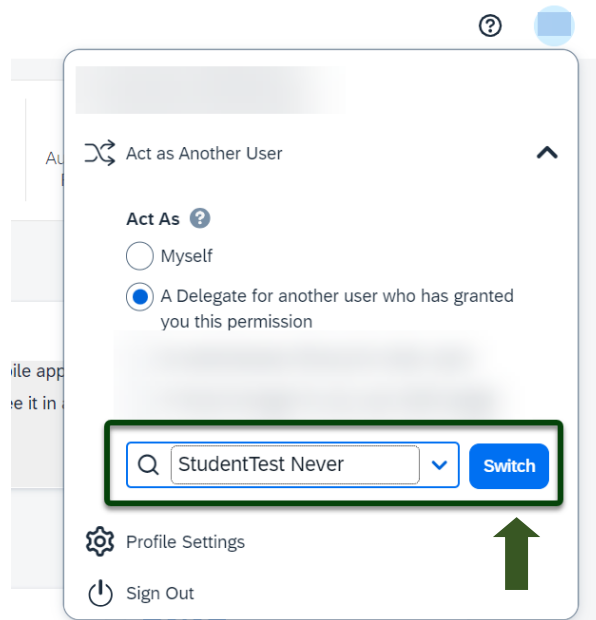name from pull-down list. Select **Switch**.



*Exhibit 16*

NOTE: User Bar should display Individual's Name.



*Exhibit 17*

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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.

**Create New Request** ✕

\* Required field

Request Policy \* ❓

| Profiled Traveler Policy ⌄ |
| --- |
| Non Profiled Traveler Policy |
| Profiled Traveler Policy |

Request/Trip Start Date \*

MM/DD/YYYY 📅

Request/Trip End Date \*

MM/DD/YYYY 📅

Request/Trip Purpose \*

None Selected ⌄

Secondary Trip Purpose

None Selected ⌄

Trip Description \* ❓ 0/500

Destination City \*

⌄

Destination Country \*

Search by Country/Region ⌄

Does this trip include personal travel? \*

None Selected ⌄

Cancel    **Create Request**

*Exhibit 18*

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.

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**TRAVEL@STATE**

## 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.
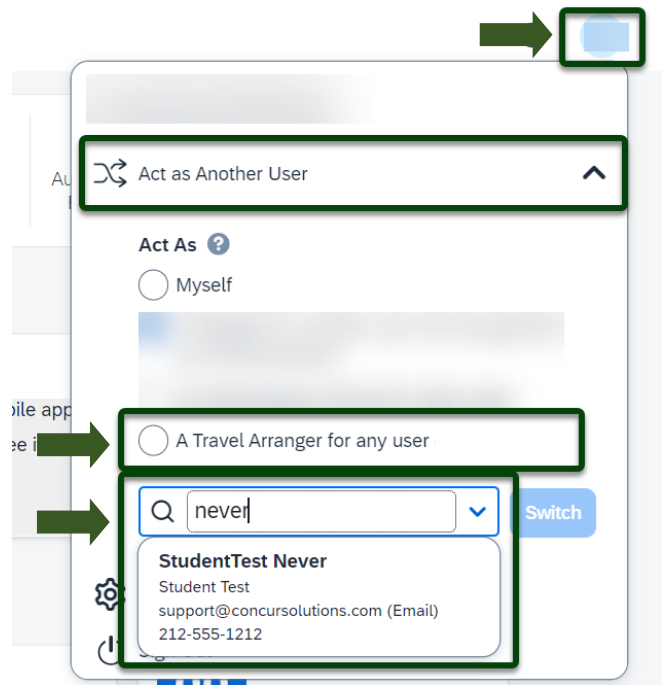


*Exhibit 19*

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**.

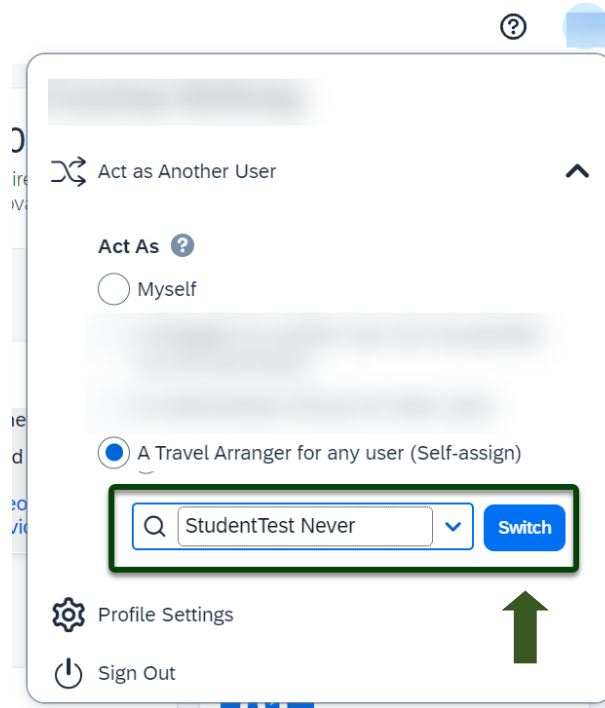2. Select the individual's name from pull-down list. Select **Switch**.



*Exhibit 20*

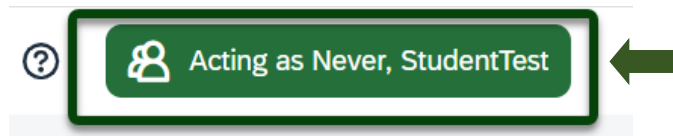NOTE: User Bar should display Individual's Name.



*Exhibit 21*