Travel Assistants vs Request/Expense Delegates

There are two different types of access a traveler can grant to another user within Concur. The two roles are named Travel Assistant/Arranger and Delegate (Request/Expense). A Travel Assistant/Arranger assists with the booking of travel, while a Delegate assists with the Request and/or Expense Report documents. A user can be assigned to both roles by the traveler directly in their profile, if desired.

Travel Assistant/Arranger

A person assigned as a Travel Assistant/Arranger may be able to book travel in Concur on your behalf or see your trip library.

Only the traveler can assign this access to another user. You cannot assign yourself to be someone else's Assistant/Arranger.

This role can be assigned by logging into Concur Travel and Expense.

1. Click the Profile link in the upper right corner.
2. Click Profile Settings.
3. On the left side navigation bar, locate the Travel Settings heading and click the "Assistants/Arrangers" link.
4. Click "Add an Assistant" to add additional people who can perform travel functions on your behalf.
5. Start typing the person's name, select the appropriate user from the available options and select the appropriate checkboxes, based on your needs. Click Save.

This role can be removed by logging into Concur Travel and Expense and navigating as noted above. Instead of "Add an Assistant" you would locate the name noted in the box that you wish to remove, click the small trash can to the far right of their name. Confirm you would like to delete this user from performing travel functions on your behalf.

If someone was setup as a Travel Assistant/Arranger prior to getting Request/Expense, the system automatically kept this information active. You should not have to re-enter this information.
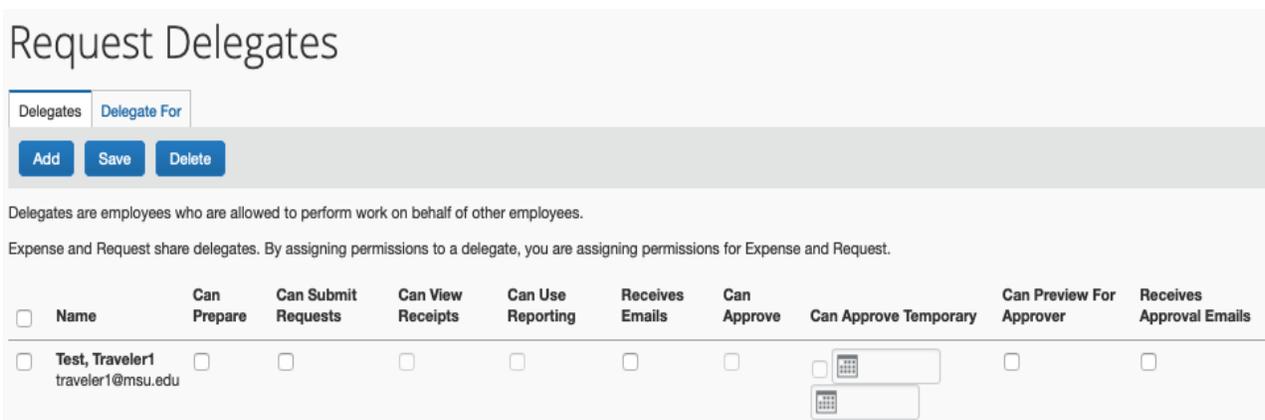
Delegate (Request/Expense)

A person assigned as a Request/Expense Delegate can perform Request and/or Expense duties on your behalf based on the checkboxes selected, including approvals. More details below.

TRAVEL@STATE

Only the traveler can assign this access to another user. You cannot assign yourself to be someone else's Delegate.

This role can be assigned by logging into Concur Travel and Expense.

1. Click the Profile link in the upper right corner.
2. Click Profile Settings.
3. On the left side navigation bar, locate the Request Settings heading and click the "Request Delegates" link. Note: Request and Expense delegates and functions are shared. You may also click on the "Expense Delegates" link and it will update in both places.
4. Click "Add" to add additional people who can perform Request/Expense functions on your behalf.
5. Start typing the person's name, select the appropriate user from the available options. Click Add.
6. User should now appear with checkboxes to select, as noted in screenshot below.

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.

	Name	Can Prepare	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐	Test, Traveler1 traveler1@msu.edu	☐	☐	☐	☐	☐	☐	☐ 📅 / 📅	☐	☐

7. Select the appropriate checkboxes for this person to be able to perform on your behalf and click Save.
   i. Can Prepare: This allows your delegate to get a Request and/or Expense Report ready on your behalf. This does not allow them to submit those documents on your behalf. These users get a "Ready for Review" button instead of a "Submit" button (unless you have granted "Can Submit Requests" access).
   ii. Can Submit Requests: This allows your delegate to prepare and submit a Request document on your behalf.
   iii. Can View Receipts: This will automatically check if you select Can Prepare. This allows your delegate to see your receipt images in your expense tab.
   iv. Can Use Reporting: This is not applicable at this time.

      v. Receives Emails: If selected, your delegate will receive all emails that you would as the traveler. Example is that if a Request/Expense is sent back for changes, the delegate as well as the traveler will be notified via email.

     vi. Can Approve: This allows your delegate to approve anything on your behalf. If you are a Fiscal Officer on different accounts, or a Department Approver, this would allow the delegate to approve **anything** that is sent to you for approval.

    vii. Can Approve Temporary: This allows your delegate to approve anything on your behalf during a specified time frame.

   viii. Can Preview for Approver: This allows your delegate to review a Request and/or Expense Report prior to your approval. This does not allow them to approve those documents on your behalf. These users get a "Ready for Review" button instead of a "Approve" button (unless you have granted "Can Approve" access).

     ix. Receives Approval Emails: If selected, your delegate will receive all emails that you would as an approver. Example is that if a request/expense arrives for your approval, the delegate as well as the approver will be notified via email.

This role can be removed by logging into Concur Travel and Expense and navigating as noted above. Instead of "Add" you would locate the name noted in the box that you wish to remove, click the checkbox to the left of their name, click Delete at the top. Confirm you would like to delete this user from performing Request/Expense functions on your behalf. You may also amend access at any time but selecting or un-selecting any checkboxes for the delegate and click the Save button.

There is also a tab on this page named "Delegate For". If you click on this link, you can see what access that other MSU profiled travelers have granted to you for delegation on their behalf.