How to Assign Delegates – Requests, Expenses, & Arrangers

There are two different types of access a traveler can grant to another user within Concur.

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

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.

**Table of Contents**

Assign a Request & Expense Delegate .......................................................................................................................... 2
Remove a Request & Expense Delegate .......................................................................................................................... 4
Assign a Travel Assistant/Arranger ............................................................................................................................ 5
Assign a 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 **Profile** > **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.
How to Assign Delegates – Requests, Expenses, & Arrangers

Remove a Request & Expense Delegate

1. 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.

Exhibit 4
Assign a 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 **Profile >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**.