How to Act as a Delegate or Travel Assistant/Arranger

There are two 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 the Booking of 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.

1. **Start at the Concur Homepage,** select Profile. 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 and/or travel arranger. If the user you are attempting to delegate/arrange for is not a listed option, please contact the user and request them to add you as a delegate and/or travel arranger.

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

**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.

4. To end a delegate or travel arranger session, select the **Acting as User** menu >Done acting for others.