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 **Request** and/or **Expense Report** functions.
- **Travel Assistant/Arranger:** Assists with **Booking Travel function**.

NOTE: If you are a **Delegate**, you can access a travelers **Request** and **Expense** tabs, if you are a **Travel Assistant/Arranger**, you can access a travelers **Travel** tab. If you are both a **Delegate** and a **Travel Assistant/Arranger**, you can access the travelers **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**.

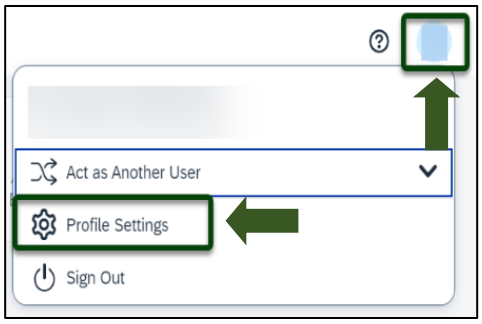

Exhibit 1

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.

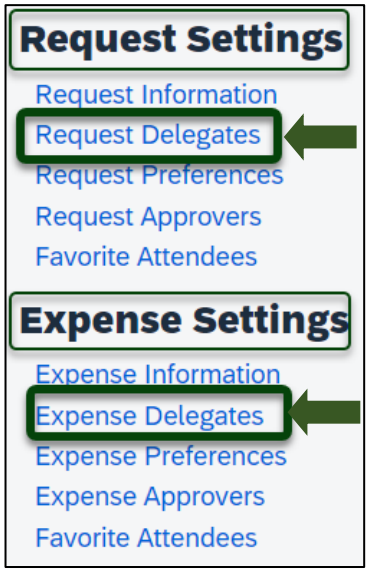

Exhibit 2

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**.

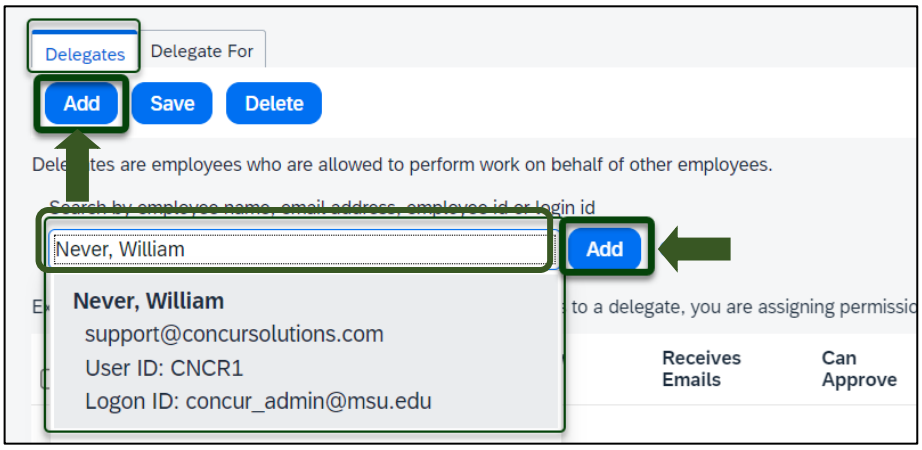

Exhibit 3

Delegates and Travel Assistants/Arrangers

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

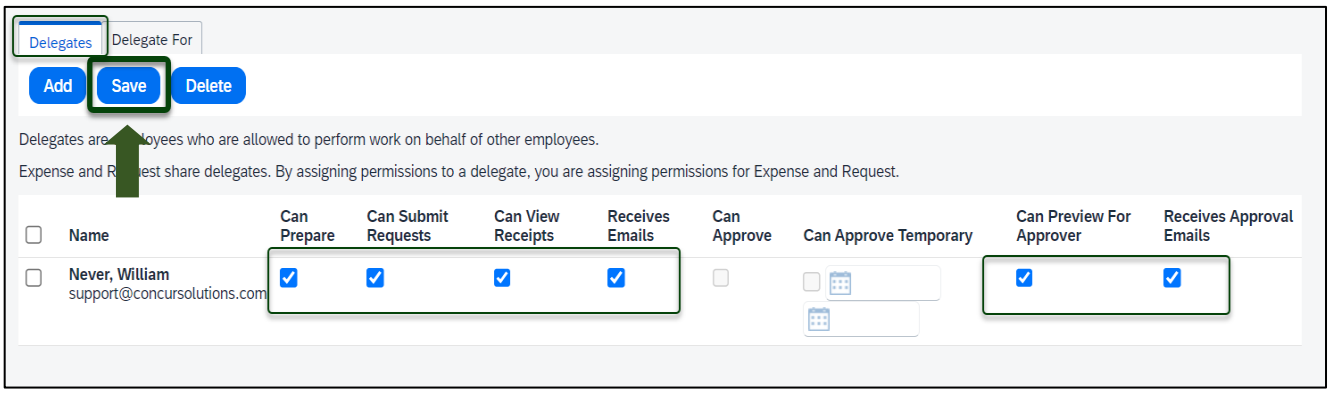

Exhibit 4

- **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 delegates 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.

Delegates and Travel Assistants/Arrangers

Remove Request & Expense Delegate

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

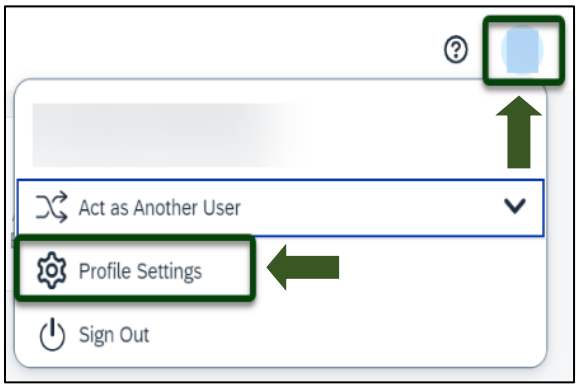

Exhibit 5

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.

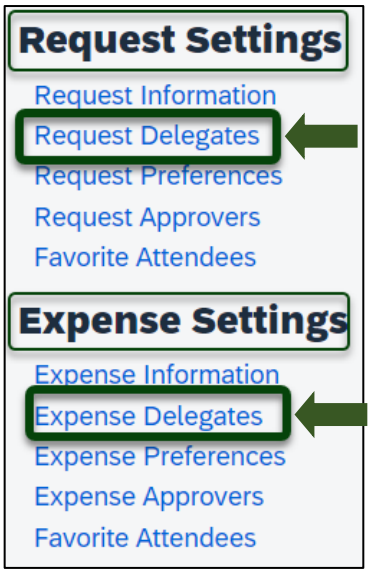

Exhibit 6

3. To view and edit a list of who you have assigned to delegate for you, click on the **Delegates** tab, locate the name of the individual/s you want to delete, click the checkbox to the left of their name. Select **Delete**.

4. 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.

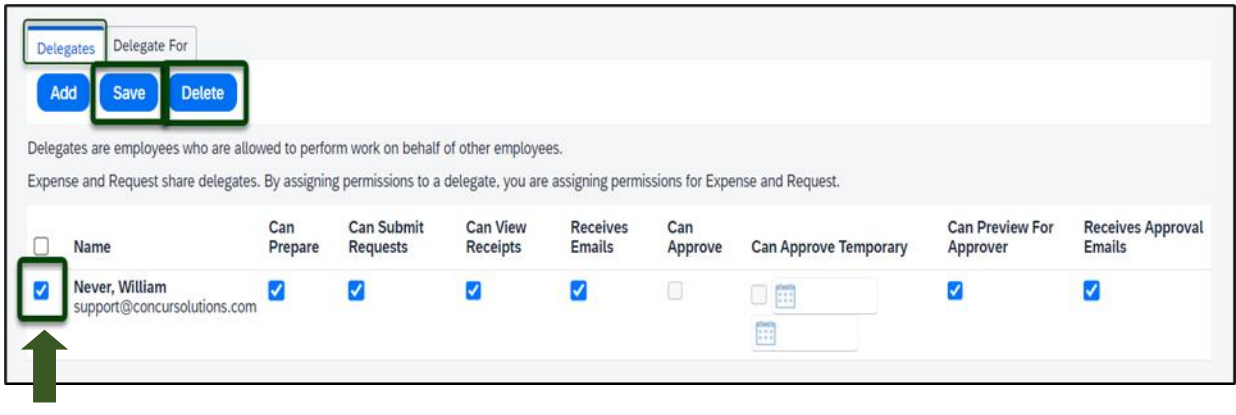

Exhibit 7

Delegates and Travel Assistants/Arrangers

5. To view, and edit a list of who you delegate for, please see *Step 2* on Remove Expense and Request Delegates to access this next step. Click on the **Delegate For** tab. Locate the name of the individual/s you want to delete, click the checkbox to the left of their name. Select **Delete**.

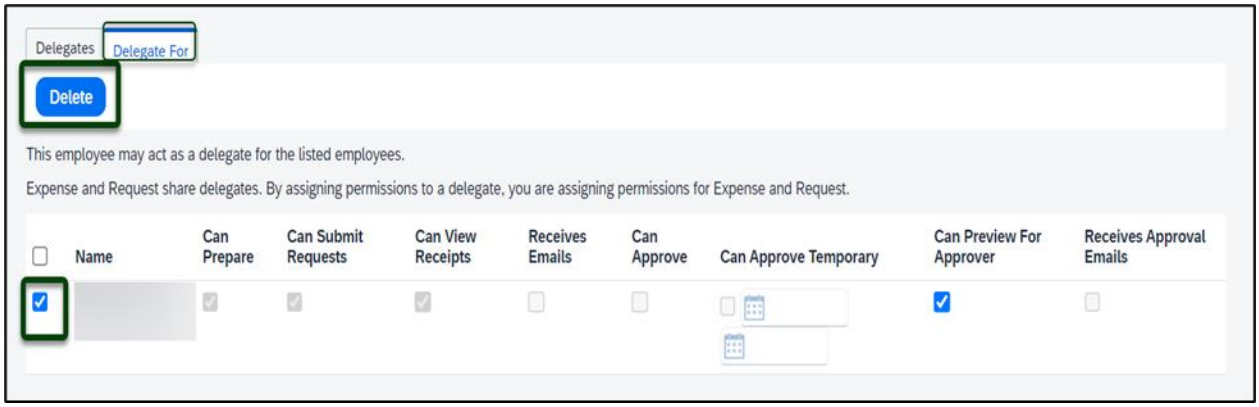

Exhibit 8

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**.

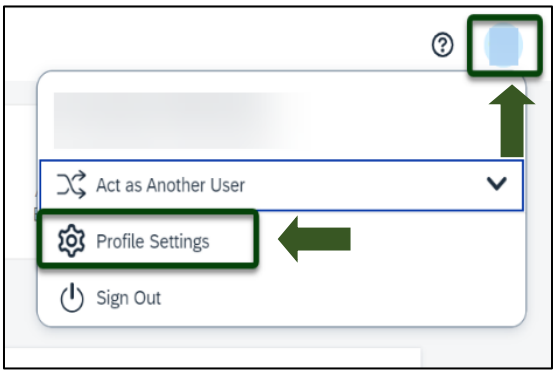

Exhibit 9

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

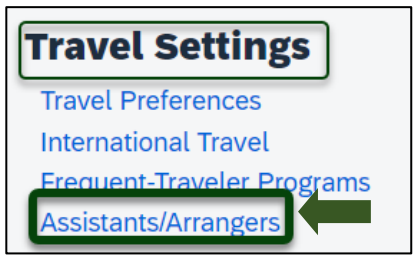

Exhibit 10

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

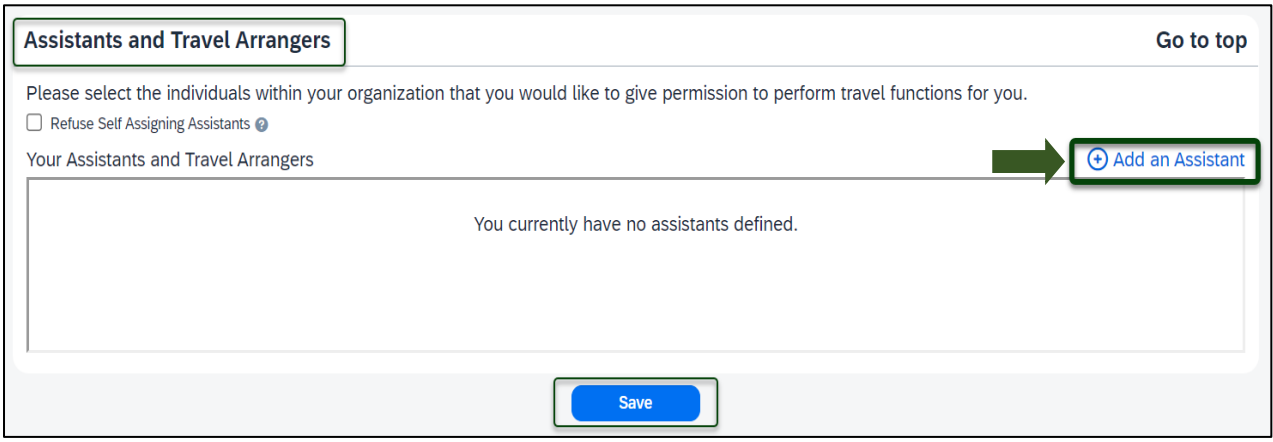

Exhibit 11

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**.

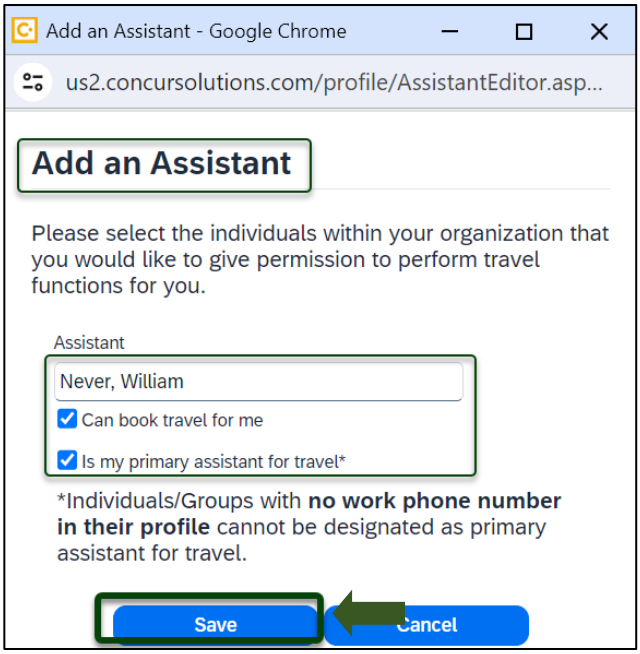

Exhibit 12

Delegates and Travel Assistants/Arrangers

Remove a Travel Assistant/Arranger

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

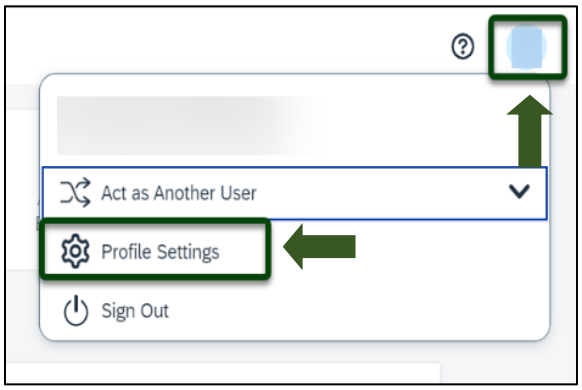

Exhibit 13

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

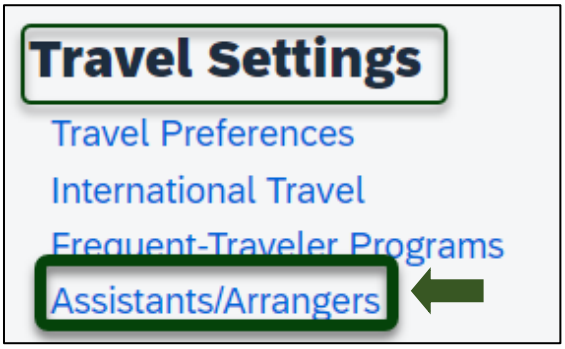

Exhibit 14

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

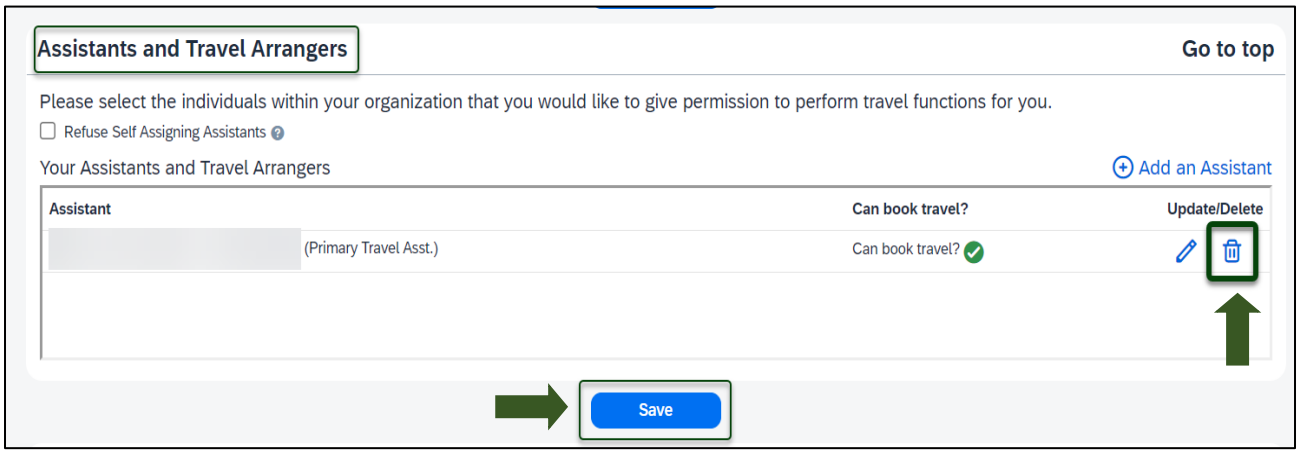

Exhibit 15

4. 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...**
Go to Home>Travel>Arrangers>I'm Assisting…

Delegates and Travel Assistants/Arrangers

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.

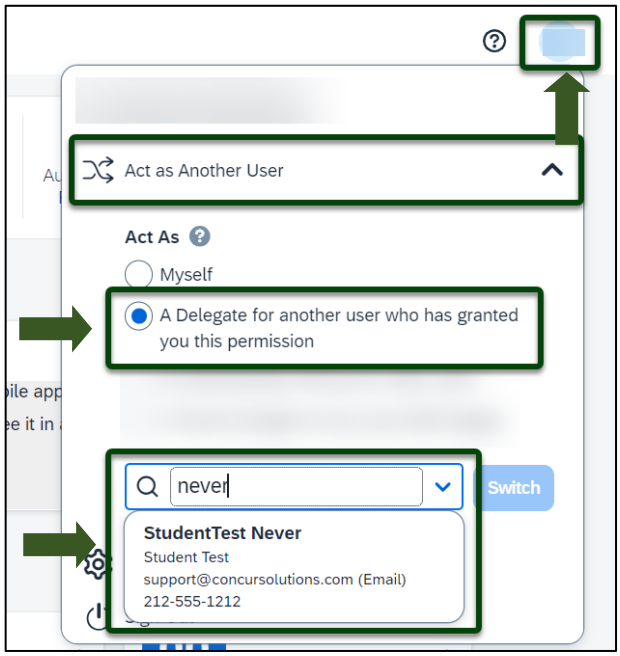

Exhibit 16

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**.

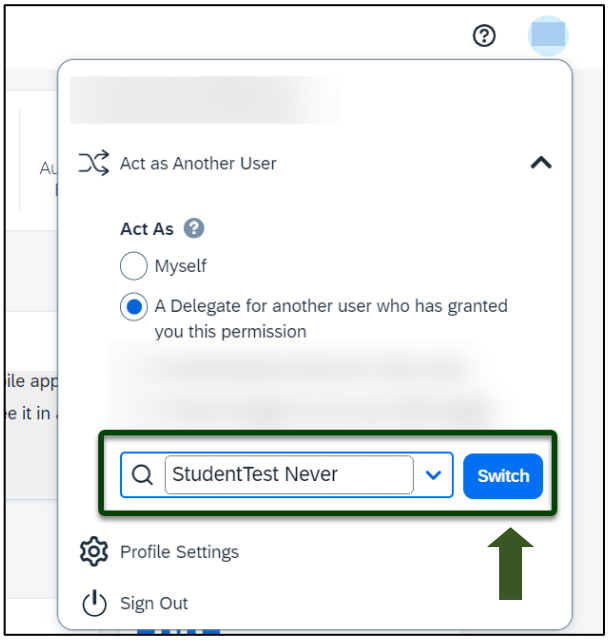

Exhibit 17

NOTE: User Bar should display Individual's Name.

Exhibit 18

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.

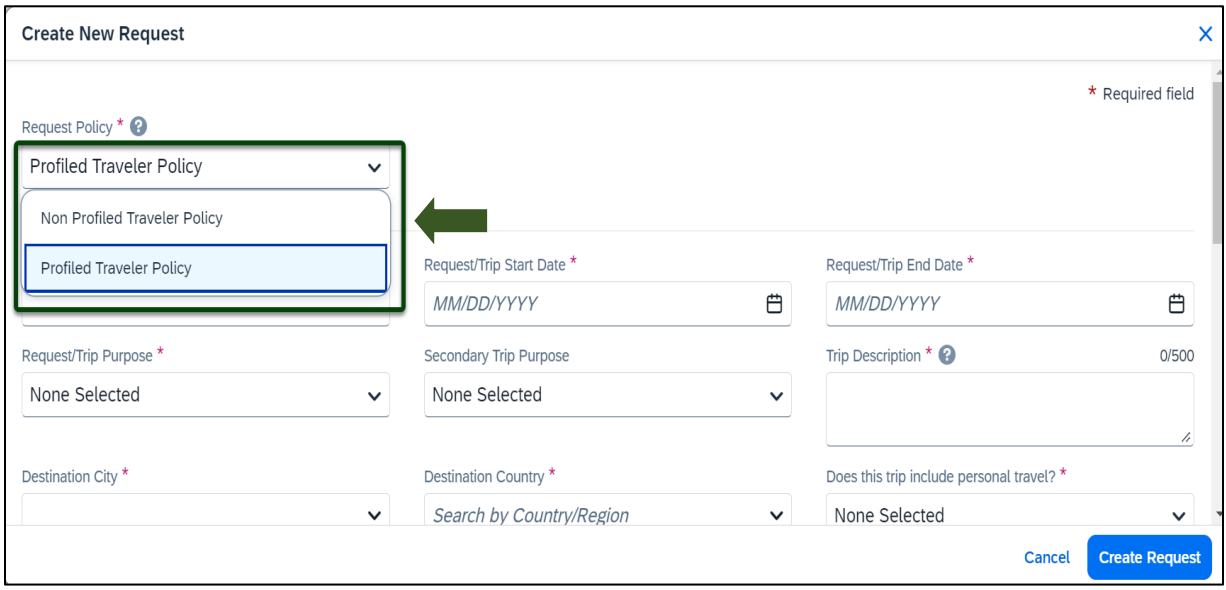

Exhibit 19

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.

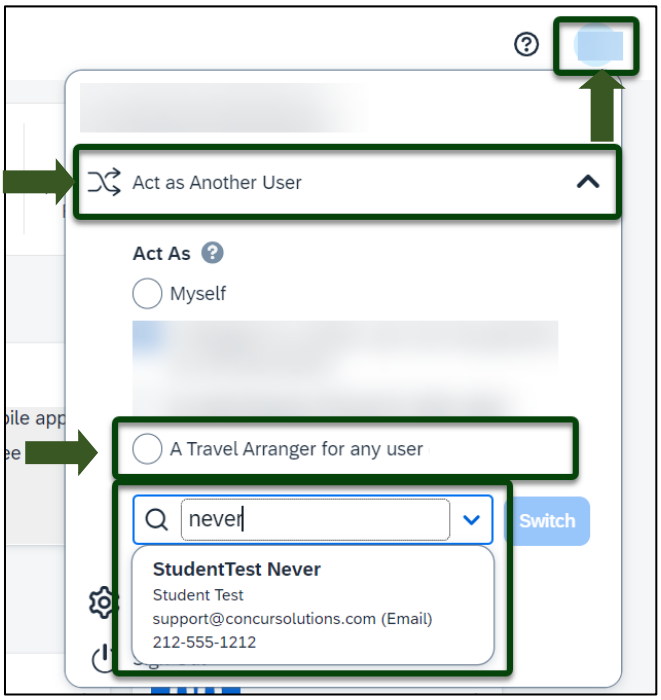

Exhibit 20

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**.

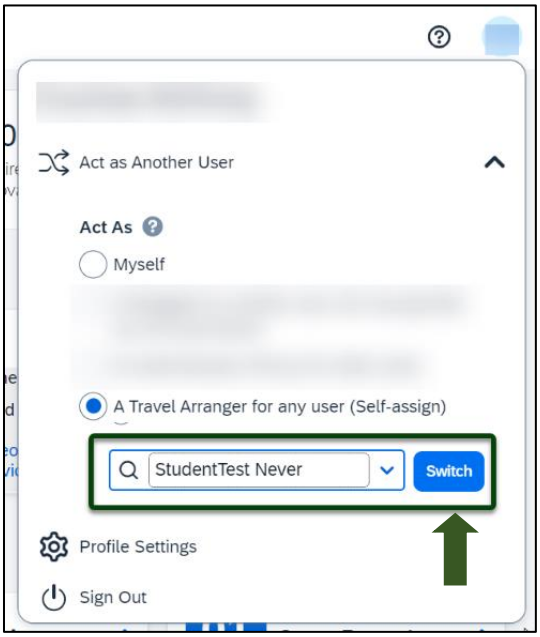

Exhibit 21

NOTE: User Bar should display Individual's Name.

Exhibit 22

Delegates and Travel Assistants/Arrangers

Remove who you are assigned to act as Travel Delegate For

1. Start at the **Concur Homepage.** Select **Travel**.

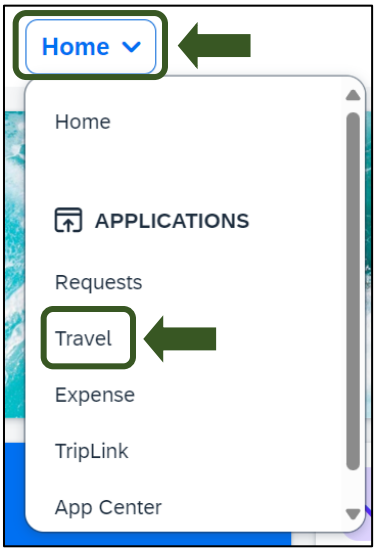

Exhibit 23

2. Select **Arrangers.**

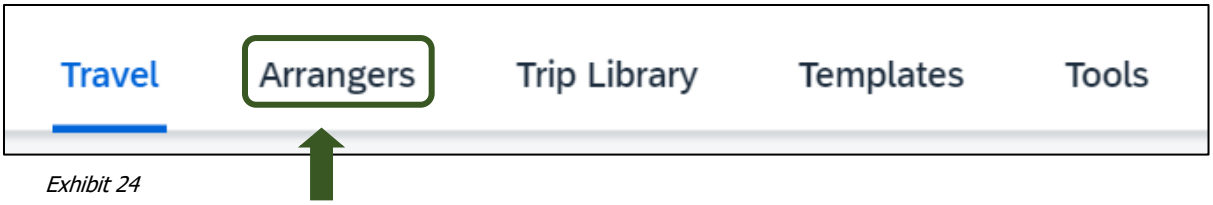

Exhibit 24

3. Select **I'm Assisting.** >Click the blue Trash Can to **Delete** the person you no longer Assist with Travel.

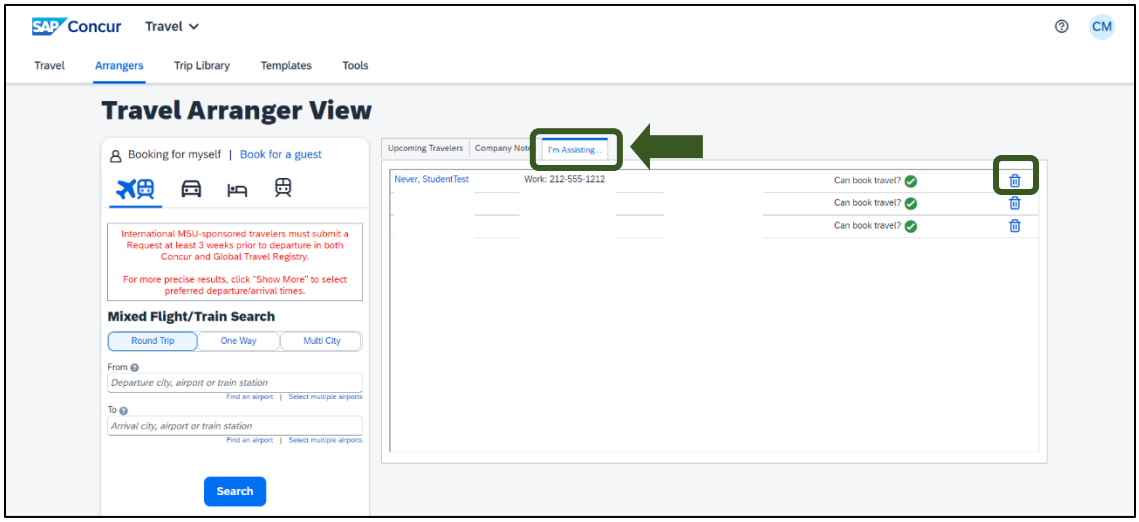

Exhibit 25