

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

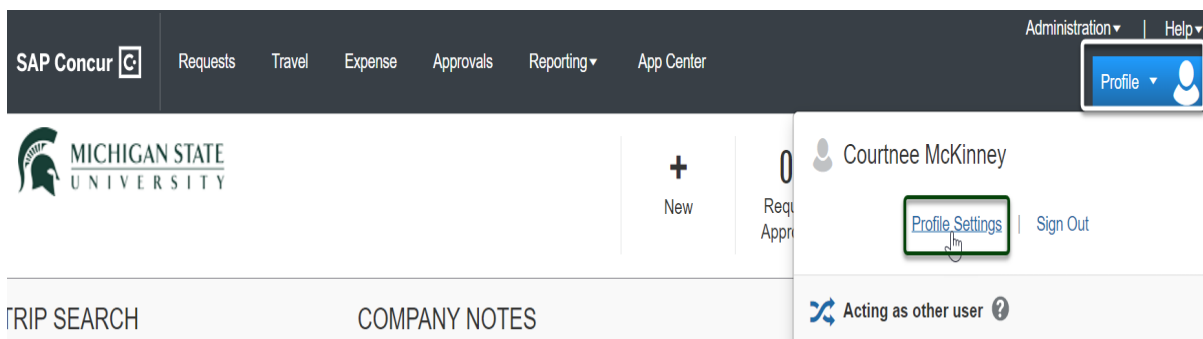
- **Delegate (Request/Expense):** Assists with the **Request** and/or **Expense Report** documents.
- **Travel Assistant/Arranger:** Assists with **Booking Travel**.

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.

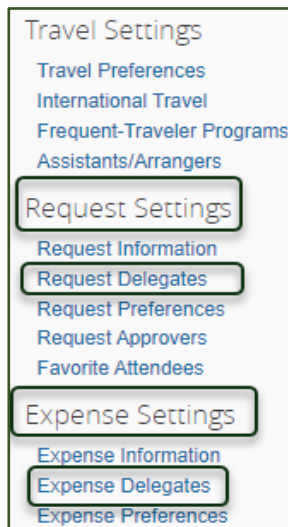
Assign Delegate in Requests & Expenses

A person assigned as a **Request/Expense Delegate** can perform Request and/or Expense duties on your behalf based on the checkboxes selected during the below process, including approvals. Only the profiled traveler can assign this access to another user.

1. Start at the **Concur Homepage**, click **Profile** icon in the upper right corner, then **Profile Settings**.

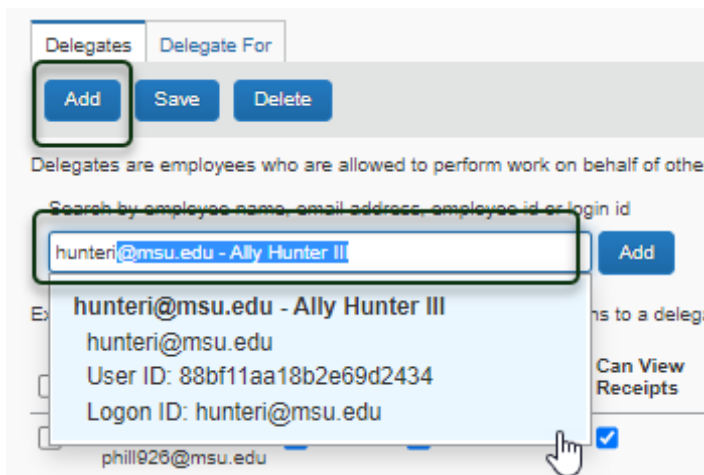


2. On the left side navigation bar, locate **Request Settings** from the list and click **"Request Delegates"**. You may also click on **"Expense Delegates"** and it will update in both places.

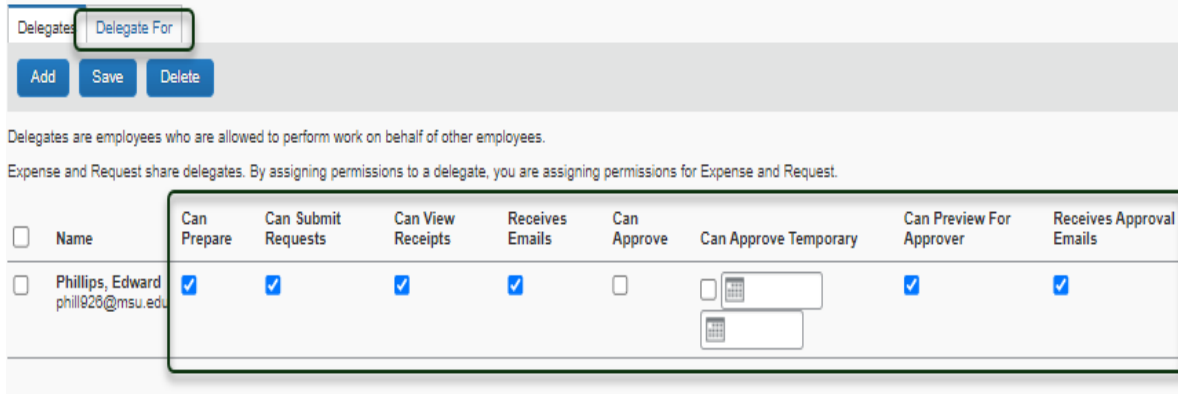


NOTE: Request and Expense delegates functions are shared.

3. Click **Add** to include additional people who can perform **Request/Expense** functions on your behalf. Start typing the user's name, select the appropriate user from the available options. Click **Add**.



4. **Select** the appropriate checkboxes for this person to be able to perform on your behalf and click **Save**.



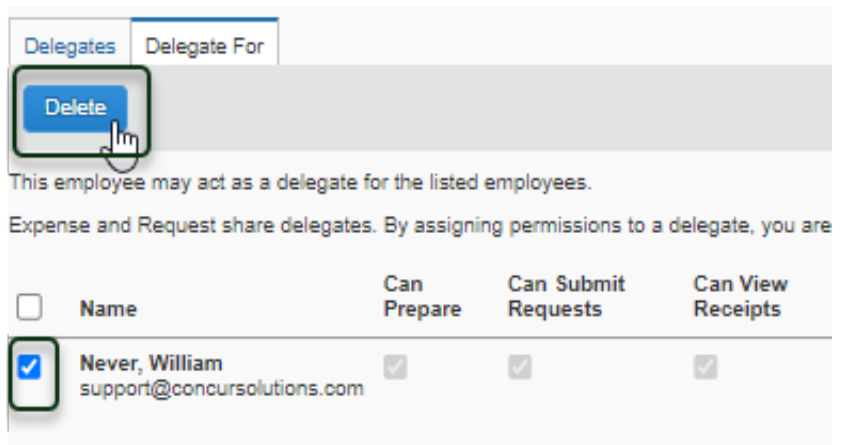
- Can Prepare:** This allows your delegate to prepare a Request and/or Expense Report on your behalf. This does not allow them to submit those documents on your behalf. These users get a "Ready for Review" button instead of a "Submit" button (unless you have selected "Can Submit Requests").
- Can Submit Requests:** This allows your Delegate to prepare and submit a Request document on your behalf.
- Can View Receipts:** This allows your delegate to see your receipt images in your Expense tab.
- Receives Emails:** If selected, your Delegate will receive all emails related to your Requests/Expense Report that you would as the traveler. Example: If a Request/Expense is sent back for changes, both Delegate and Traveler will be notified via email.
- Can Approve:** This allows your Delegate to approve anything on your behalf. If you are a Fiscal Officer, or a Department Approver, this would allow the delegate to approve anything that is sent to you for approval.
- Can Approve Temporary:** This allows your delegate to approve anything on your behalf during a time frame.
- 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).
- Receives Approval Emails:** If selected, your delegate will receive all emails that you would as an approver. If a request/expense arrives for your approval, the delegate as well as the approver will be notified via email.

There is also a tab on this page named **"Delegate For"**, which shows what access other MSU profiled travelers have granted to you for delegation on their behalf.

Remove Delegate in Requests & Expenses

The **Delegate Role** can be removed by navigating as noted above.

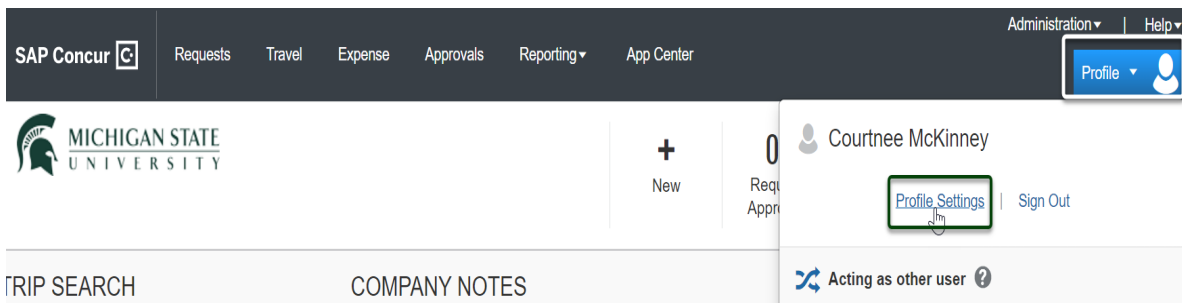
Instead of selecting **Add** you would locate the name noted in the box that you wish to remove, click the checkbox to the left of their name, click **Delete**. Confirm you would like to delete this user from performing Request/Expense functions on your behalf. You may also amend access at any time by selecting or un-selecting checkboxes for the delegate and click the **Save** button.



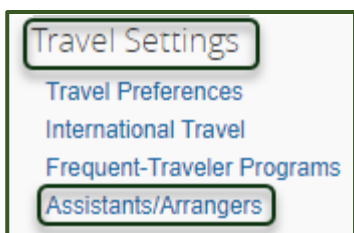
Assign Travel Assistant/Arranger

A person assigned as a **Travel Assistant/Arranger** can book travel in Concur on your behalf or see your trip library. Only the traveler can assign this access to another user.

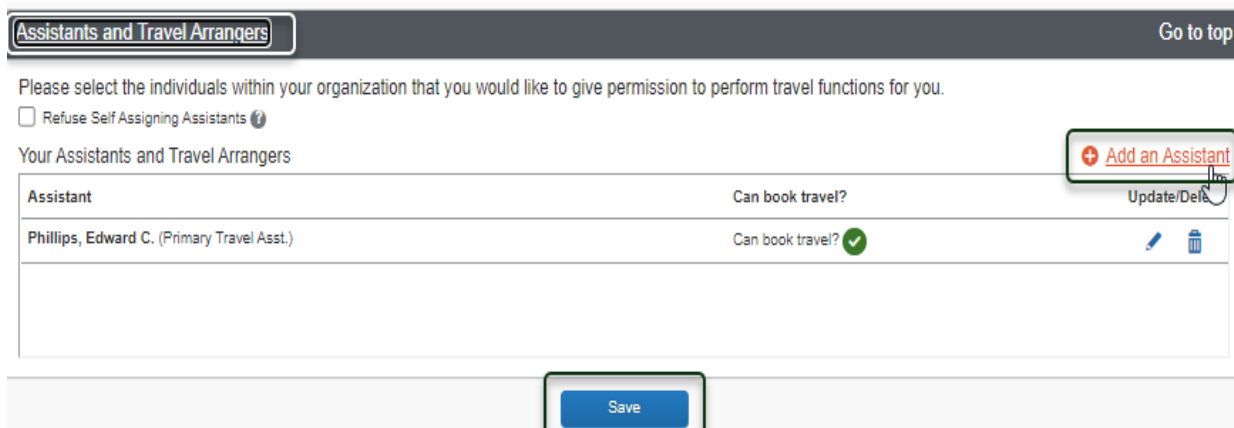
1. Start at the **Concur Homepage**, click your **Profile** icon in the upper right corner, then **Profile Settings**.



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



3. Click **Add an Assistant** to add additional people who can perform **Travel** functions on your behalf.



4. Start typing the person's name, select the appropriate user from the options. Choose the checkboxes based on your needs. Click **Add**.

