

DELEGATES & TRAVEL ASSISTANTS

MAY 2020

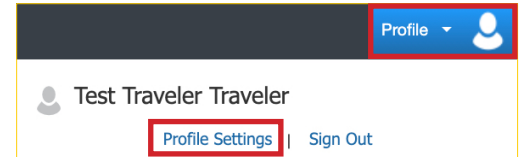
CONCUR

A Delegate is an employee who is granted permission to act on behalf of another employee to perform tasks within Concur.

ADDING A DELEGATE

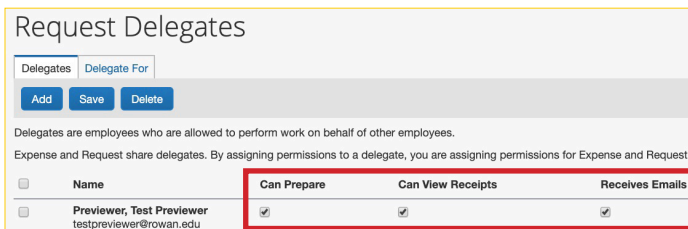
A Delegate will need the same level or higher permission to act on your behalf.

1. From the Concur home page, select **Profile** then **Profile Settings**.
2. Select **Request Delegates** on the left menu.
3. You will see two tabs 'Delegates' and 'Delegate for'. On the 'Delegates' tab, select **Add**.
4. Use the search field to type in the name or email of the person you wish to add as a delegate.
5. A list of names/emails will appear, select the appropriate person.
6. Check the boxes that correspond to the permissions you are granting the delegate.



Traveler Permissions available to assign to a delegate:

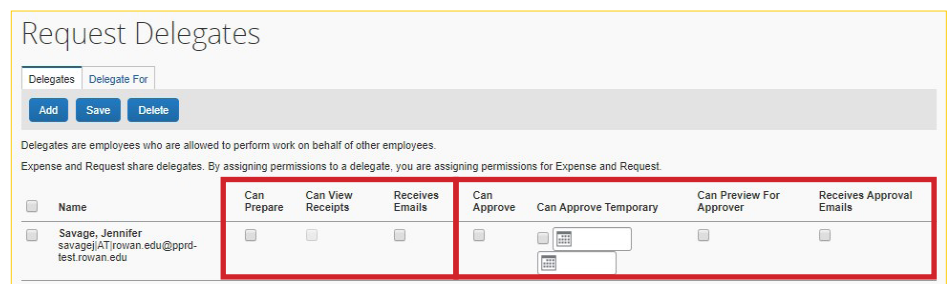
- **Can Prepare** – Allows the delegate to prepare Requests and Expense Reports on your behalf. However, the delegate cannot submit the Request/Expense Report.
- **Can View Receipts** – Allows the delegate to view electronic receipts that the traveler has sent to Concur. This will automatically be checked when you select “Can prepare.”
- **Receives Emails** – The delegate receives a copy of email notifications.



Approver Permissions available to assign to a delegate:

Delegate Approvers have the ability to prepare, view receipts, and receive emails as well as the following:

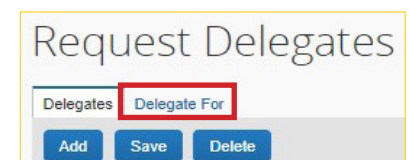
- **Can Approve** – Allows the delegate to approve Requests and Expense Reports on the approver’s behalf.
 - **Can Approve Temporary** – Grants approval permission to your delegate for a specific time period.
 - **Can Preview for Approver** – This can be used as an additional level of review before the approver reviews the Request. A previewer cannot approve or reject a Report but they can send it back to the traveler if something is missing/incorrect.
 - **Receives Approval Emails** – The delegate will be copied on emails about Requests and Expense Reports pending approval.
7. Select **Save**. You will see “your changes have been saved” on your screen.



Once you add the Delegate under Request, the delegate will be added to Expense Delegates automatically. The Delegate can now log into their Concur account and perform tasks on your behalf.

You can review the people who have granted you delegate status and what permissions you have been granted by selecting the **Delegate For** tab.

If you would like the delegate to book travel via Concur on your behalf, you will also need to add them as an Assistant/Travel Arranger.

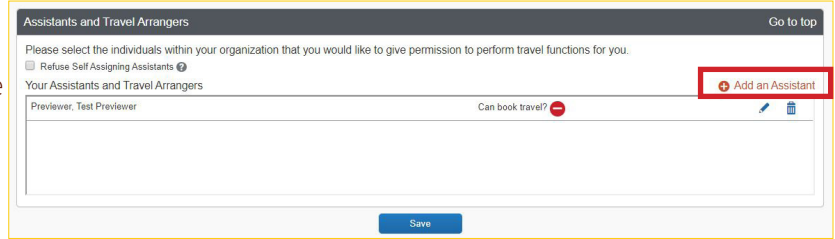


An Assistant/Arranger is an employee who is allowed to book travel in Concur on behalf of another employee.

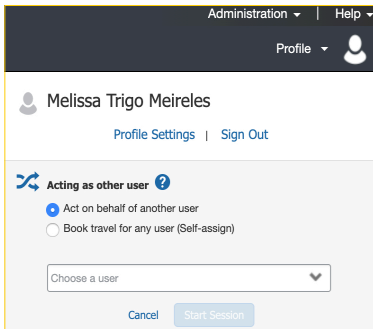
ADDING A TRAVEL ASSISTANT/ARRANGER

You can assign more than one Travel Arranger, but you can only have one primary assistant. In order for the Travel Assistant/Arranger to book travel, they must also be added as a Delegate. This will give them access to the Request and Expense Report related to the travel.

1. From the Profile Settings page, select **Assistants/Arrangers** on the left menu.
2. In the Assistants and Travel Arrangers section, select **+ Add an Assistant**.
3. A new window will appear. Use the search field to type in the name or email address of the employee you wish to add as an Assistant/Arranger.
4. When the name appears, select the name.
5. Under the search bar, you will see two permissions:
 - **Can book travel for me** (Travel Arranger) – the employee can book travel on your behalf and will receive email confirmations for the travel the arranger has booked.
 - **Is my primary assistant for travel** (Primary Assistant) – the employee can book travel for you, modify your user profile as needed, and receive travel email notifications in regards to your travel regardless of who made the reservation. Note: Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.
6. Select the permission you wish to grant.
7. Select **Save**.



ACTING AS A DELEGATE OR TRAVEL ASSISTANT/ARRANGER



1. From the Concur home page, select **Profile** in the top right corner.
2. Select the drop-down under “Acting as other user,” and select the name of the person you would like to act as.
3. Select **Start Session**.
4. On the top right corner of the screen, you will see a green box that displays “**Acting as**” and shows the name of the employee you are acting on behalf of. You are now working as a delegate on behalf of that person.

If you have been granted ‘Prepare’ permissions for a Delegate, complete the process for Creating a New Request or an Expense Report and select **Notify Employee**. The traveler must be the one to **Submit** the Request/Expense Report.

If you have been added as a Travel Arranger/Assistant, you can book travel in Concur. Complete the process for Booking Online using Concur.

To return to acting as yourself, select **Acting as** on the top right corner of the screen and then select **Done acting for others**.

