TRAVEL®STATE 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 <u>Concur</u> <u>Homepage</u>, 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 <u>Individual's Name</u>.









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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.

Create New Request				×
				* Required field
Request Policy * 😮				
Profiled Traveler Policy	~			
Non Profiled Traveler Policy				
Profiled Traveler Policy	Request/Trip Start Date *		Request/Trip End Date *	
	MM/DD/YYYY		MM/DD/YYYY	
Request/Trip Purpose *	Secondary Trip Purpose		Trip Description *	
None Selected	✓ None Selected	~]		
				te
Destination City *	Destination Country *		Does this trip include personal travel? *	
• •	Search by Country/Region	~	None Selected	~
			Cancel	Create Request

Exhibit 4

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, ٠ 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.

SAP Concur C Requests Expense			Help Acting as Test, Traveler2 V	
MICHIGAN STATE	+ New	0 Author Requ	Currently acting as Test, Traveler2 Profile Settings Sign Out	
COMPANY NOTES			X Acting as other user 🔞	
Institutional Data Policy Users should not enter confidential data in any field that is not designed for that piece of information. Please do not store social se information shown in any receipts. Information about confidential data at Michigan State is provided in the MSU Institutional Data f			Search by name or ID Q Cancel Start Session	
Concur Training Toolkit This link will provide information to utilise the Concur Expense System.			Done acting for others	
Exhibit 5			1	