

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.

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## Assign a 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 **Profile** > **Profile Settings**.

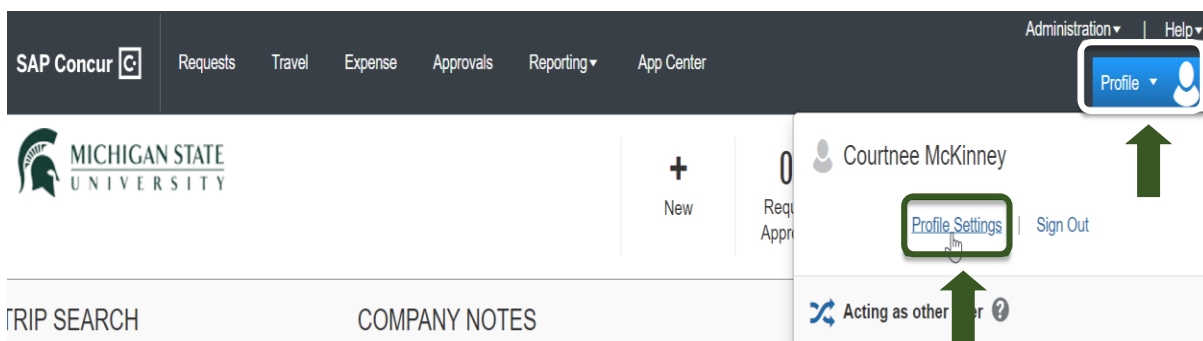


Exhibit 1

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.

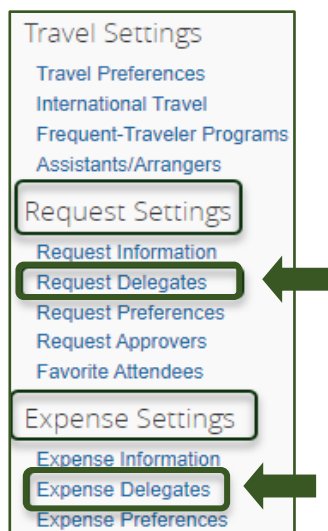


Exhibit 2

NOTE: Request and Expense delegates functions are shared.

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**.

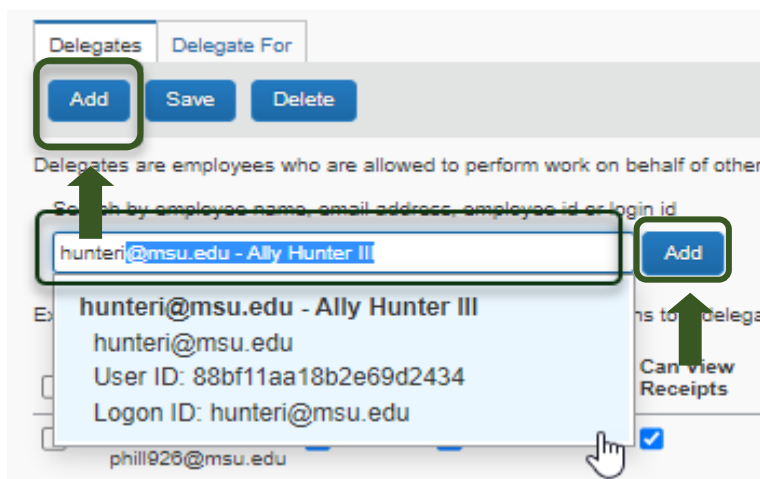


Exhibit 3

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

Delegates are employees who are allowed to perform work on behalf of other employees.  
 Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	Phillips, Edward phill926@msu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 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 users 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.

## Remove a Request & Expense Delegate

1. Locate the name noted in the box that is to be removed and click the checkbox to the left of their name. Select **Delete**.

2. 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.

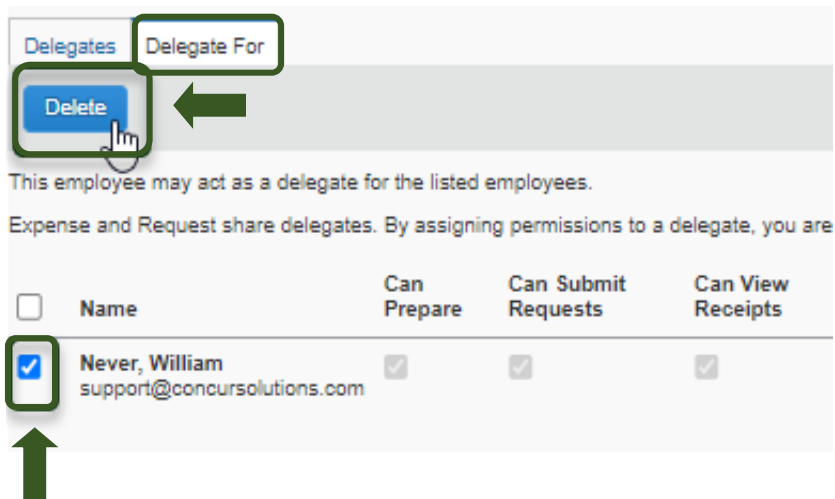


Exhibit 4

## Assign a 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 **Profile > Profile Settings**.

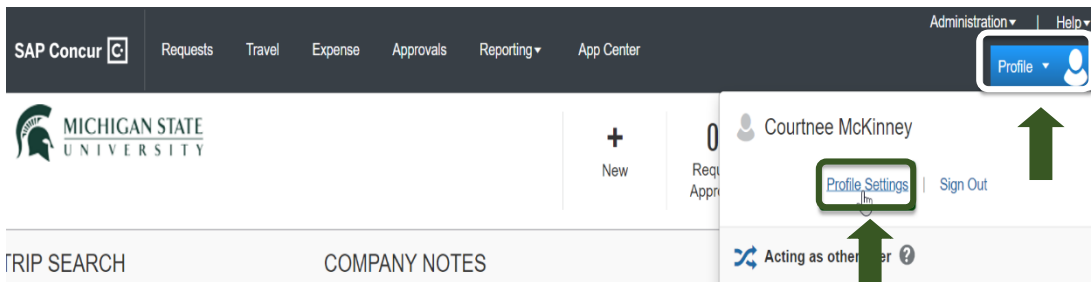


Exhibit 5

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

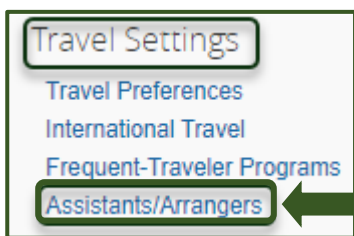


Exhibit 6

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

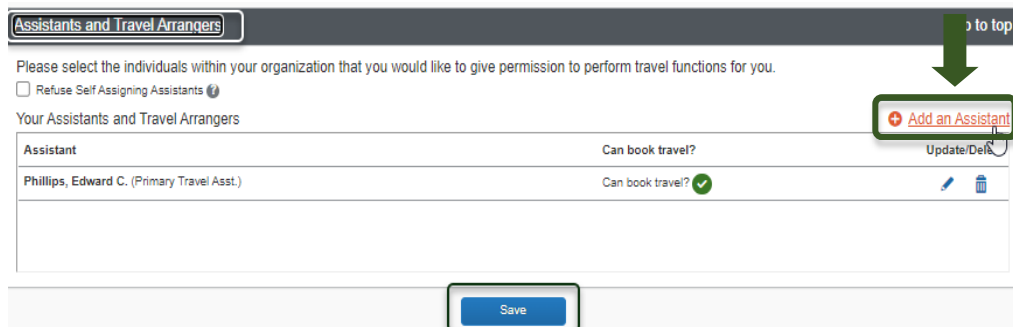


Exhibit 7

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**.

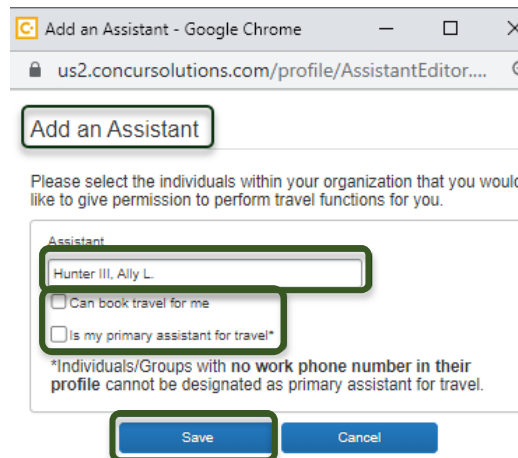


Exhibit 8