

Step-by-Step Guide

Acting as a Delegate or Travel Arranger in the Concur Travel & Expense System

What is a Delegate?

A delegate is an individual authorized to process expense reports, in the Concur Travel & Expense System, on behalf of another person.

Delegates are not policy specific – that is, as a delegate you can process both Procurement Card expense reports and Travel Reconciliation expense reports on behalf of the individual for whom you are a delegate. It is up to you and the individual to identify which type(s) of expense reports you should actually process.

There are two types of delegates:

- A Prepare Delegate can prepare expense reports for another individual.
- An Approve Delegate can approve expense reports on behalf of another individual. (To be an Approve Delegate, you must already have approval authority.)

What is a Travel Arranger?

A travel arranger (also called a travel assistant) is an individual authorized to book travel, in the Concur Travel & Expense System, on behalf of another person. (This role is not needed to use Christopherson Business Travel to book travel on behalf of another person.) As a travel arranger, you have access to view and modify the Concur Travel & Expense Profile for each of your designated travelers. Additionally, you can view another's upcoming trips, within Concur, whether those trips were booked using Concur or Christopherson Business Travel.



Delegates are assigned for expense report processing, while travel arrangers are assigned for travel processing. Delegates and travel arrangers are not necessarily the same people. You can be just a delegate, just a travel arranger, or both a delegate and a travel arranger.

Acting as a Delegate or Travel Arranger

If you have been assigned as a delegate or travel arranger for someone, you will see **You are administering for Yourself** next to your name in the upper left corner of your Concur screen. Click the *Yourself* link for the Select User to Administer area to appear...which contains a dropdown of names.

The screenshot shows the Concur system interface. At the top, a blue header bar contains the text 'Welcome, Heather N Hoer [You are administering for: Yourself]' with a red circle around the 'Yourself' link. Below this is a 'Select User to Administer' dropdown menu. To the right of the dropdown is a 'You are administering Expense for:' dropdown menu with 'Me' selected, and a 'Proxy Search' button. At the bottom, a navigation bar includes links for 'My Concur', 'Expense', 'Reporting', 'Administration', and 'Profile'.

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Your dropdown of names lists only those individuals who have identified you as a delegate, or travel arranger, to act on their behalf. Use this dropdown any time you need to act as a delegate or travel arranger for an individual.

Once you select an individual from your dropdown of names, your Concur home page will display the sections you can access on the individual's behalf. If you are a delegate, you will see the Company Info, Active Work, and Available Card Charges sections. If you are a travel arranger, you will see the Travel Info, Trip Search, and Trip List sections. If you are both a delegate and a travel arranger, you will see every section.

Note: The EXPENSE DELEGATE page (located under **Profile**) cannot be accessed when acting as a delegate – this is where delegates are identified.