

## 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?

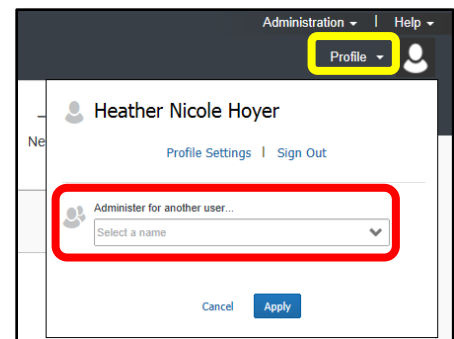
A travel arranger (also called a travel assistant) is an individual authorized to book travel, in the Concur Travel & Expense System, on behalf of another person. (This role is not needed to use Christopherson Business Travel to book travel on behalf of another person.) As a travel arranger, you have 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

Select your **Profile** menu in the upper right corner of your screen.

If you have been assigned as a delegate or travel arranger for someone, you will see the **Administer for another user...** section within your Profile. Use the box that appears under this section to search for and select the individual on whose behalf you need to act as a delegate or travel arranger. Then, click **Apply**.



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**Note:** You will only be able to locate those individuals who have identified you as their delegate and/or travel arranger.

Your Profile menu in the upper right corner of your screen will change to display the name of the individual on whose behalf you are acting. You will also only see the areas you can access on the individual's behalf. If you are a delegate, you can access the Expense area. If you are a travel arranger, you can access the Travel area. If you are both a delegate and a travel arranger, you can access both areas.

To end your delegate or travel arranger session: Select the **Administer for** menu in the upper right corner of your screen – which is in the same location as your **Profile** menu when you are acting on your own behalf – and click **End admin session**.