

Concur How-to: Acting as a Delegate or Travel Arranger ^[1]

Delegates are assigned for expense report processing, while travel arrangers are assigned for travel processing. You can be just a delegate, just a travel arranger, or both a delegate and a travel arranger.

Read the procedures

1. Select the **Profile** menu in the upper right corner.
2. If you have been assigned as a delegate or travel arranger for someone, you will see the **Acting as other user** section.
3. **To act on behalf of someone else:**
Use the dropdown to search for and select the individual on whose behalf you need to act. Then, click **Start Session**. A green box will appear in the upper right corner of your screen, displaying the name of the individual on whose behalf you are acting.

Note: You will only be able to locate those individuals who have identified you as their delegate and/or travel arranger.
4. 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 tab. If you are a travel arranger, you can access the Travel tab. If you are both a delegate and a travel arranger, you can access both tabs.
5. **To end your delegate or travel arranger session:**
Select the **Acting as other user** menu (green box in the upper right corner of your screen) and click **Done acting for others**.

Source URL: <https://www.cu.edu/psc/training/booking-travel/acting-delegate-or-travel-arranger>

Links

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