Concur How-to: Acting as a Delegate or Travel Arranger

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