Concur Travel & Expense

ASSIGNING A DELEGATE/ TRAVEL ARRANGER
Assigning a Delegate/ Travel Arranger

- Delegate Overview
  - Assigning
  - Permissions
- Travel Arranger/Assistant Overview
  - Assigning
  - Permissions
Delegate Overview

Delegate - an employee who is allowed to perform work on behalf of another employee in Concur.

- Request and Expense share delegates. By assigning permissions to a delegate, you are assigning permissions for both Request and Expense.
- You can assign more than one delegate if needed.
- If you would like the delegate to book travel via Concur on your behalf, you will also need to add them as an Assistant/Travel Arranger.
Assigning a Delegate

Steps to Assign a Delegate:

1. On the Concur Homepage, Click on Profile > Profile Settings.
2. Under Request Settings, click on Request Delegates.
3. Once you add the delegate under Request, the delegate will be added to Expense Delegates as well automatically.
Assigning a Delegate

4. Click on Add.
5. Type in employee’s name and once you have the correct individual, click on their information.
6. Select the permissions you want to give to your delegate by clicking on the appropriate permission box.
Delegate Permissions

Traveler Permissions:

- **Can Prepare** – Prepare Travel Requests and Expenses Reports. However, the delegate cannot submit the Request/Expense Report.

- **Can View Receipts** - View Receipt Images

- **Can Use Reporting** – Run Concur Reports within your hierarchy.

- **Receives Emails** - Receive a copy of Email Notifications (No approval emails)

  We recommended granting all 3 permissions if assigning a delegate the **Can Prepare** permission.
Delegate Permissions – Can Use Reporting

Can Use Reporting – Delegate Permission

- This permission can be delegated up to 2 employees.
- Only Reports to Approvers will have **Reporting** access in Concur. If you have Reporting Access, you will have a **Reporting** Tab at the top of your Concur Account.
- Delegate can only query results within your hierarchy. So, the higher the approval level, the better the results.
Delegate Permissions

- **Approver Permissions**: Approvers will have additional approval permissions to assign to a delegate.
  - **Can Approve** - Approve Travel Requests and Expenses Reports without date constraints
  - **Can Approve Temporarily** - Approve Temporarily (beginning/end date required)
  - **Can Preview for Approver** - Preview Travel Request/Expense Report for Approver prior to Approval. Delegate cannot approve. They can either Send Back Request/Expense Report or Notify Approver they have previewed. A green reviewed check box will appear next to any request/expense report once previewed.
  - **Receives Approval Emails** – Delegate will receive a copy of Approval Email Notifications (make sure this permission is checked no matter the other permissions granted). You will still receive the email notifications even though you have assigned a delegate to approve/preview.

- In order to assign a delegate permissions **Can Approve** and **Can Approve Temporarily**, the employee must already have approver access in Concur and should have the same, if not higher job classification as you.
Travel Arranger/Assistant Overview

**Assistant/Arranger** - an employee who is allowed to book travel on behalf of another employee in Concur.

- You can assign more than one Travel Arranger. However, you can only have one Primary Assistant.
- In order for the Assistant/Travel Arranger to book travel, you will also need to add them as a Delegate.
Assigning an Assistant/ Travel Arranger

Steps to Assign an Assistant/Travel Arranger:

1. On the Concur Homepage, Click on Profile > Profile Settings.

2. Under Travel Settings, click on Assistants/Arrangers.
Assigning an Assistant/ Travel Arranger

3. Click on **Add an Assistant**

4. Type in employee’s name and once you have the correct individual, click on their information.
5. Assign permissions by choosing and clicking one of the permission’s:

- **Primary Travel Assistant vs. Travel Arranger** –
  - **Travel Arranger (Can book travel for me)** can perform travel functions such as book travel on another employee’s behalf.
  - **Primary Travel Assistant (is my primary assistant for travel)** can book travel on another employee’s behalf and receive confirmation emails and notifications from CBT (Christopherson Business Travel) regarding the employees’ travel (regardless of who booked the travel) and update their User Profile if needed.

6. Click **Save**.

- You can only have one primary assistant but can have multiple travel arrangers.
- In order to make someone a **Travel Assistant/Arranger**, you must also make them a **Delegate** for Travel Request/Expense.
For more in depth information regarding Concur Travel & Expense, please check out the Concur Handbook and other related documentation at: https://fiscaff.sfsu.edu/content/sf-state-travel-center