How to Assign an Employee as a Delegate and Travel Arranger in Concur

TRAVEL ARRANGER STEPS

In order to have an employee book travel on your behalf in Concur, you must add them as a Travel Arranger and a Delegate under your User Profile.

Click Profile > Profile Settings

Under Travel Settings, Click Assistants/Arrangers.

Click Add an Assistant.

Type last name of the employee you want to add and once Concur finds the appropriate individual, click anywhere in their name.
If you are only adding one person to book travel, you can grant the permission, **is my primary assistant for travel**. They will receive all CBT email notification regarding travel (regardless of who booked the travel), and be able to update your user profile. Please note: you can only have 1 primary assistant but multiple people book travel (first option). By only checking the first box **Can book travel for me**, the employee can book travel for you and will receive all travel notifications as long as they booked the travel.


***Once you add them as a Travel Arranger, you need to also make them a Delegate.***
DELEGATE STEPS

In order to have an employee perform work on your behalf in Concur and/or book travel on your behalf, you will need to add them as a Delegate. Request and Expense share delegates so you only need to add them under one setting.

Under Request Settings, click Request Delegates.

Click Add.

Delegates are employees who are allowed to perform work on behalf of other employees. Request and Expense share delegates. By assigning permissions to a delegate, you are:

- Name
- Can Prepare
- Can View Receipts
- Can Use Reporting
- Receives Emails

Type in employee’s last name and click on their name once Concur finds the appropriate individual.
TRAVELER PERMISSIONS

Click Can Prepare, (Can View Receipts box will self-check) and Receives Emails.

Then Save.

Please note: Delegates will be able to prepare Request and Expense Reports on your behalf, however they will not be able to submit the Request/Expense Reports for you. Once they have completed their work in Concur, they will click Notify Employee and then you will receive an email from Concur stating there is a Request/Expense Report that has been prepared and ready to review and submit.
APPROVER PERMISSIONS

If you are an approver, you will have Approver permissions to grant to another employee (must be an approver in Concur already). Previewer permissions (Can Preview for Approver) does not require employee to be an approver.

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<th>Can Use Reporting</th>
<th>Receives Emails</th>
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**Can Approve** - Approve Travel Requests and Expenses Reports without date constraints

**Can Approve Temporary** - Approve Temporarily (beginning/end date required)

**Can Preview for Approver** - Preview Travel Request/Expense Report for Approver prior to Approval

**Receives Approval Emails** - Receive a copy of Approval Email Notifications

To add a Previewer to review Travel Requests and Expense Reports prior to the approver approving...

Click **Can Preview for Approver** *(Can View Receipts will check)* and **Receives Approval Emails**.

Then Click **Save**.

Previewer and approver will receive all Approval Notification Emails pending the approver’s approval.

Previewer can go in as the approver and has two options once review is complete. They can Send Back the request/Expense Reports for correction (comment) or Notify Approver that it has been reviewed. (Previewer, same as approver has the ability to add a comment, add an attachment, or edit a chartfield to any request/expense report).

Approver will receive a second email once the Request/Expense Report is reviewed and that it is ready to review and approve. There will be a green check next the Request/Expense Report once indicating it has been reviewed. The approver still has the same number of calendar days to approve with a previewer.