
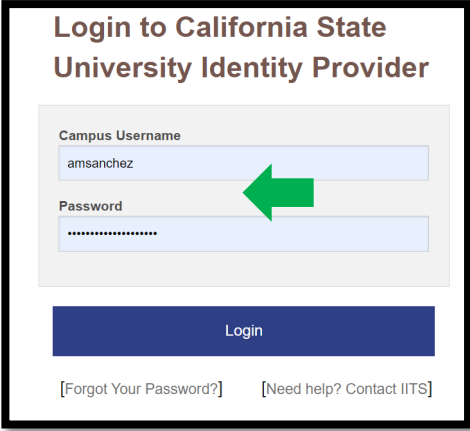
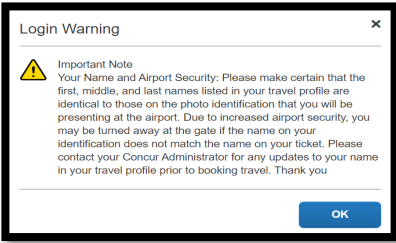
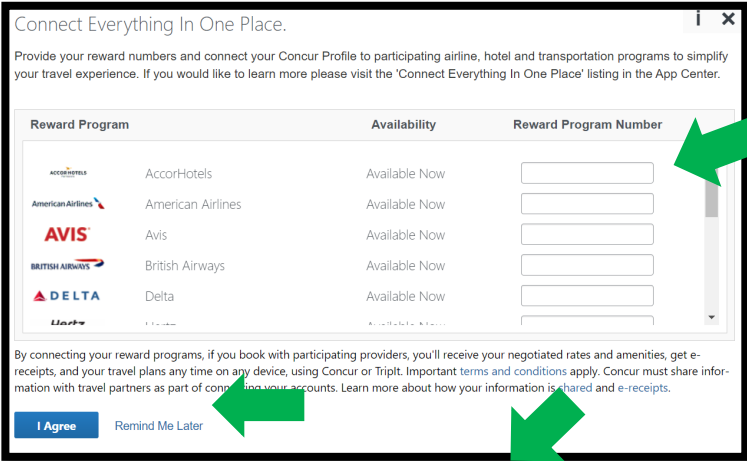


Concur Delegates and Arranger Set Up

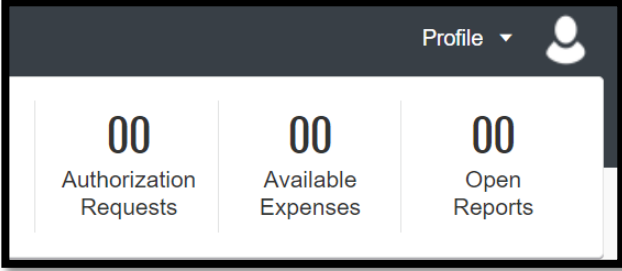

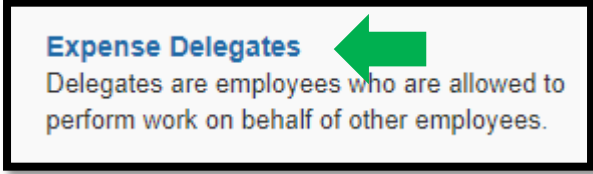
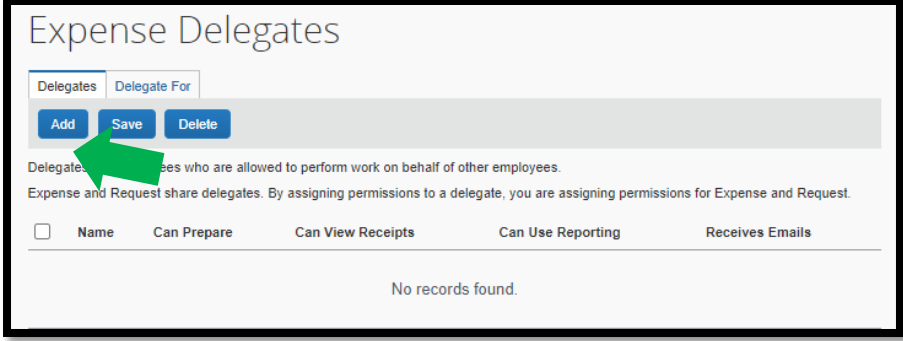
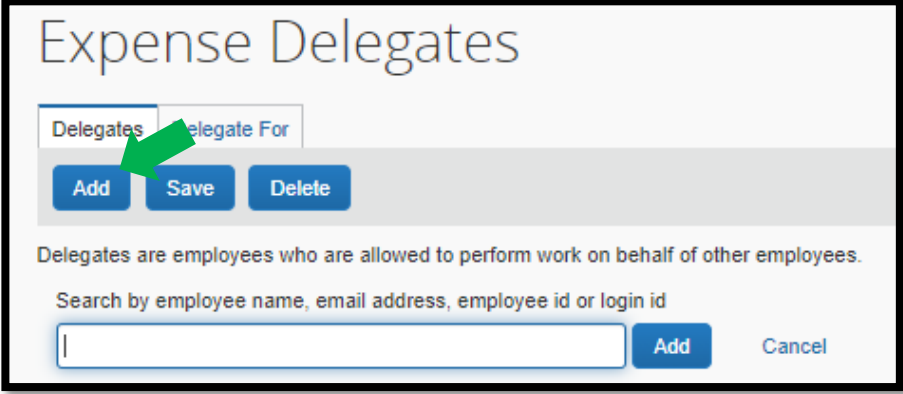
Request/Expense Delegate: This individual can create Travel Requests and Expense Reports on behalf of another employee.

Travel Arranger: This individual can make travel reservations for another employee.

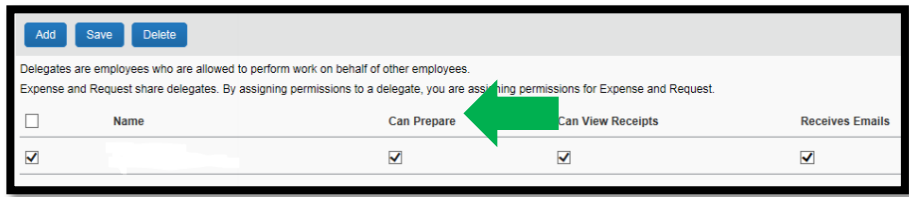
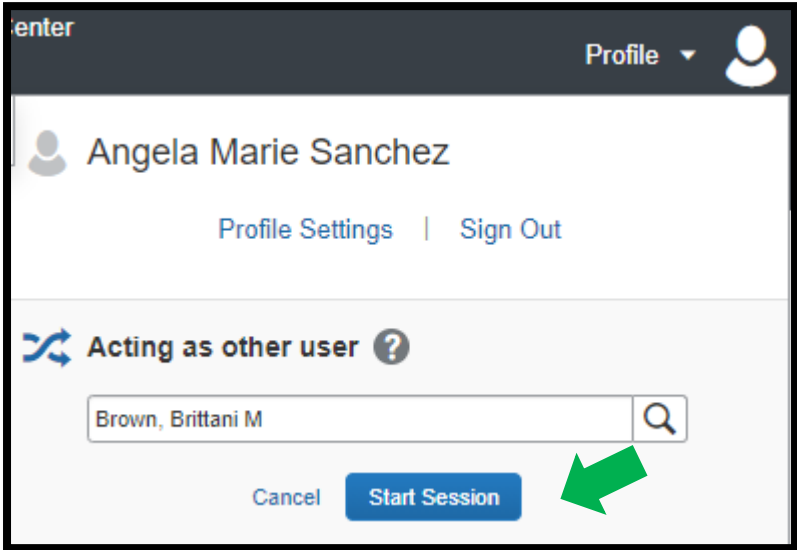
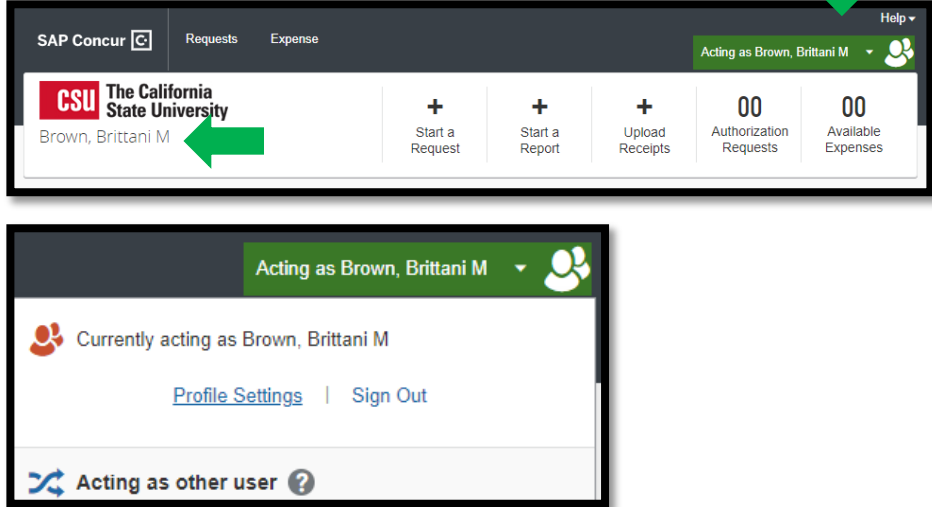
How to Assign a Request or Expense Delegate:

Processing Steps	Screenshot
Log in to concur using this link.	Concur Log in 
Enter CSUSM Credentials. Hit log in.	
Concur warning updates, click ok.	
If applicable you can enter reward numbers. If you do not have rewards you can disregard.	

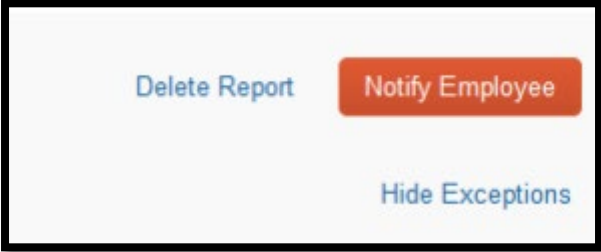

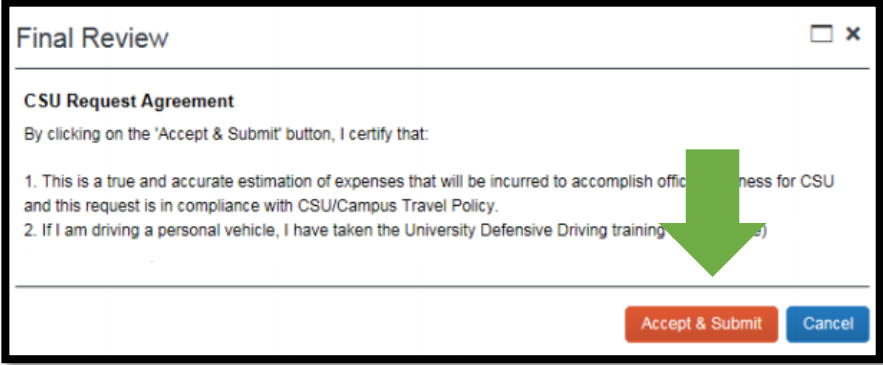
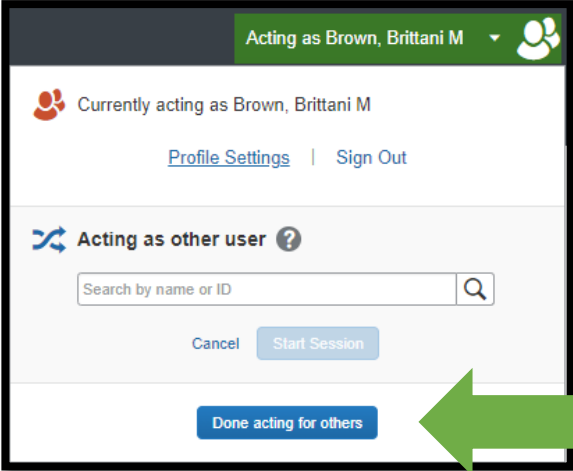
Concur Delegates and Arranger Set Up

<p>Go to the right-hand corner, click Profile, and then Profile Settings.</p>	 
<p>Click the Expense Delegates tab.</p>	
<p>Click the Add button.</p>	
<p>Type the first few letters of the last name of the employee you wish to be your delegate.</p>	

Concur Delegates and Arranger Set Up


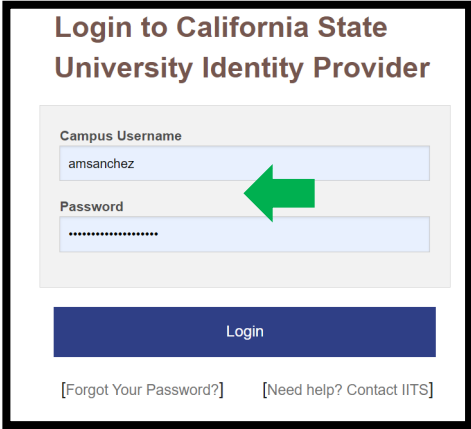
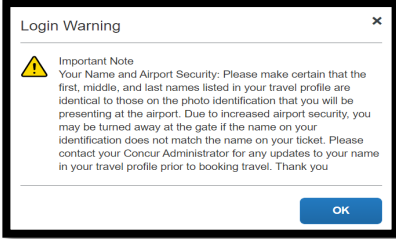
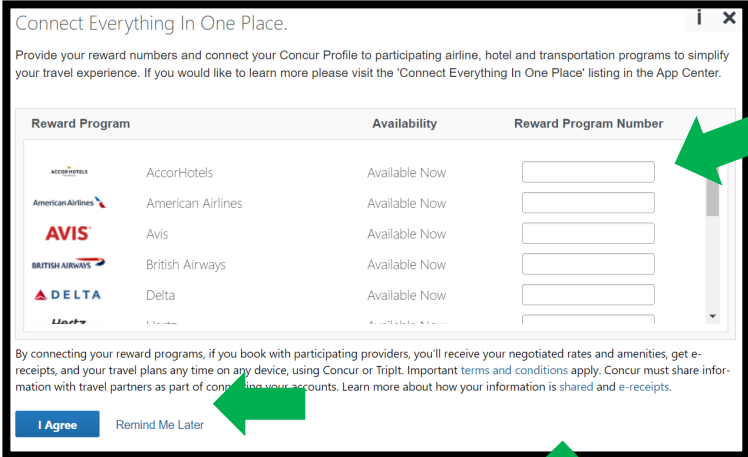
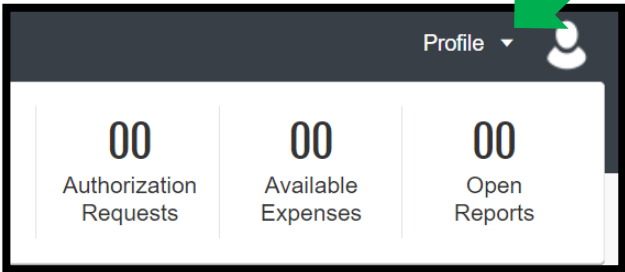
<p>Select the permissions you want your delegate to have, and then click the Save button.</p>	
<p>Once the employee is selected and the permissions granted, the employee will be able to act on behalf of the traveler.</p>	
<p>The Delegate will now see that they are acting on behalf of the traveler, and can create a Travel Request or Expense Report on behalf of the traveler.</p>	

Concur Delegates and Arranger Set Up





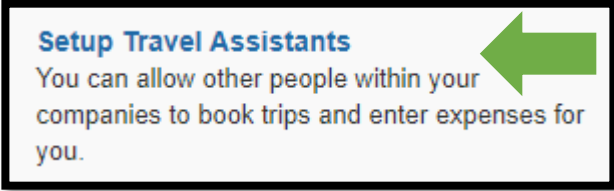
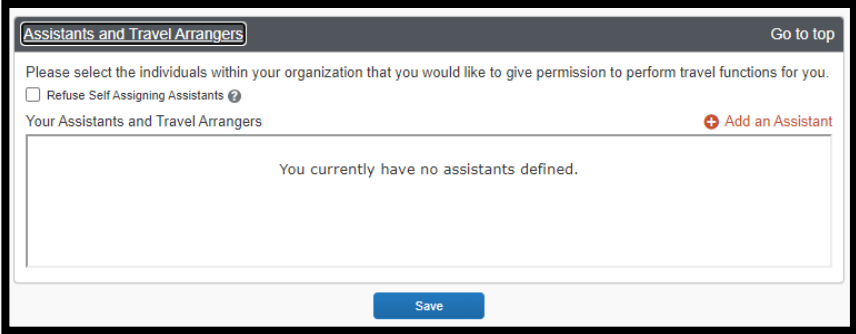

<p>Delegates can create Travel Requests and Expense Claims for travelers, however they cannot Submit the report for the traveler. When the delegate has completed a report, they must Notify Employee.</p>	 
<p>The traveler will receive a notice that their Travel Request or Expense Claim is ready for review.</p> <p>Once the traveler has reviewed the report, they must Submit the report themselves to ensure the information is accurate and in line with the policy.</p>	
<p>Go back to Profile settings to end the delegate session and click Done acting for others.</p> <p>Or enter another last name to delegate on behalf of another user.</p>	

Concur Delegates and Arranger Set Up

How to Assign a Travel Arranger:

Processing Steps	Screenshot
Log in to concur using this link.	Concur Log in 
Enter CSUSM Credentials. Hit log in.	
Concur warning updates, click ok.	
If applicable you can enter reward numbers. If you do not have rewards you can disregard.	
Go to the right-hand corner, click Profile , and then Profile Settings .	

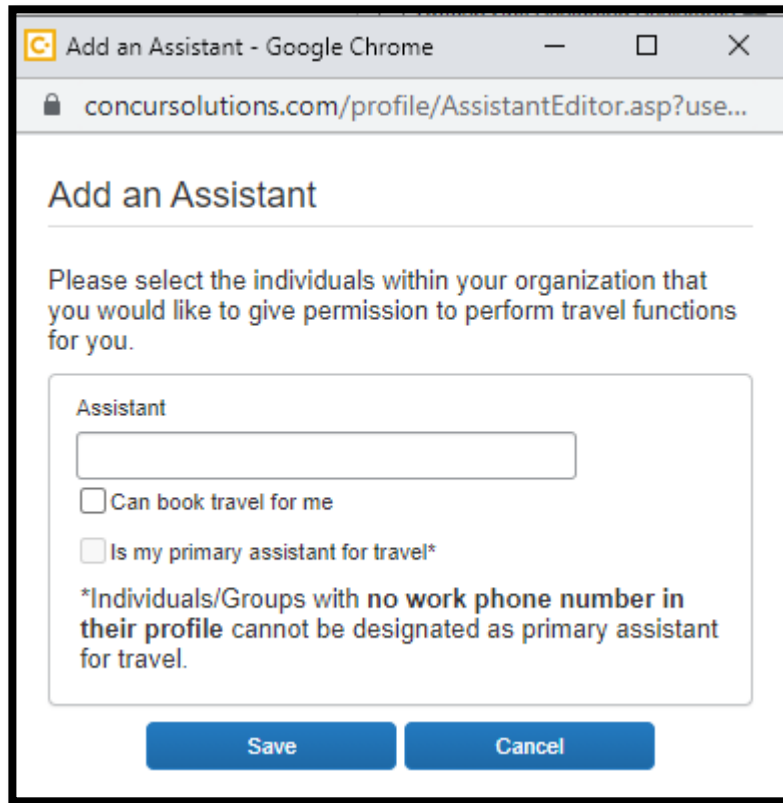
Concur Delegates and Arranger Set Up

	 <p>Angela M Sanchez Profile Settings Sign Out</p> <p> Acting as other user </p> <p>Search by name or ID <input type="text"/> </p> <p>Cancel Start Session</p>
<p>Click Setup Travel Assistants.</p>	 <p>Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you.</p>
<p>Click Add an Assistant.</p>	 <p>Assistants and Travel Arrangers Go to top</p> <p>Please select the individuals within your organization that you would like to give permission to perform travel functions for you.</p> <p><input type="checkbox"/> Refuse Self Assigning Assistants </p> <p>Your Assistants and Travel Arrangers Add an Assistant</p> <p>You currently have no assistants defined.</p> <p>Save</p>

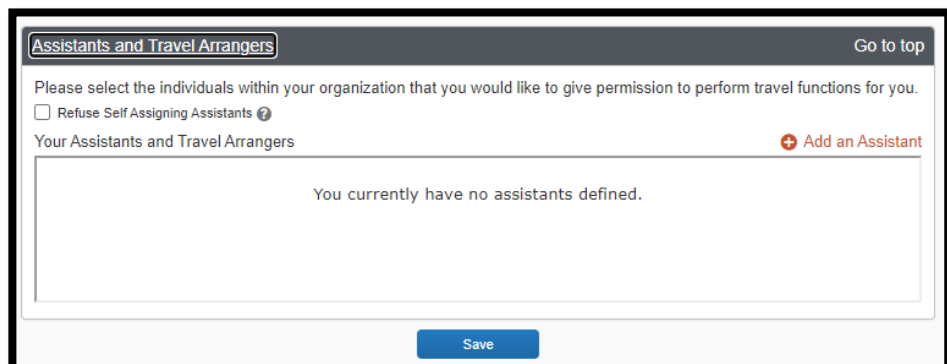
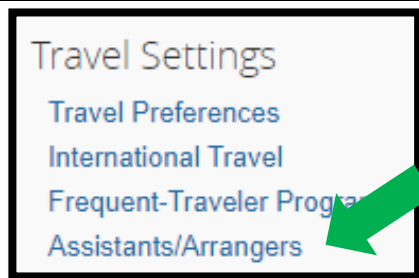
In the empty field below **Assistant**, enter the last name of the employee to be designated as the Travel Arranger.

Select the individual who is to be the **Travel Arranger**, and then select whether the Travel Arranger can only **book travel**, or whether they will be the **primary assistant** which means that the Travel Arranger will have access to the employee's profile information.

Ensure you **Save** your selections.



Once the employee is selected, the traveler will see the employee's name in the **Assistants** and **Travel Arrangers** box.



Concur Delegates and Arranger Set Up


From your Profile Settings, select **Book travel for any user** and enter the name of your traveler. Choose the traveler you wish to make reservations for.



Profile Settings | Sign Out

 **Acting as other user** ?

- Act on behalf of another user
- Act as user in assigned group (Proxy)
- Book travel for any user (Self-assign)



Cancel