

DELEGATE

A delegate in Concur can prepare travel requests (pre-trip authorization), expense reports, and be a substitute approver (if applicable). Review the quick reference guides on [Assign a Delegate](#) and [Act as a Delegate](#).



Tip: Delegates can only prepare requests and expenses; the traveler will need to submit.

TRAVEL ASSISTANT

A travel assistant in Concur is given permission to book travel for a traveler. Follow the instructions below to assign a travel assistant.

From within Concur, at the top right of the screen click on profile then profile settings. Select Setup Travel Assistants.

The screenshot shows the SAP Concur Profile Options page. The top navigation bar includes 'Requests', 'Travel', 'Expense', 'Approvals', 'App Center', and 'Admin'. Below the navigation is a secondary menu with 'Profile', 'Personal Information', 'System Settings', 'Concur Mobile Registration', 'Concur Mobile Devices', and 'Travel Vacation Reassignment'. The main content area is titled 'Profile Options' and contains several sections: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards), 'Travel Settings' (Travel Preferences, International Travel, Frequent-Traveller Programs, Assistants/Arrangers), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees), and 'Setup Travel Assistants' (which is highlighted with a red box). The 'Setup Travel Assistants' section describes how to allow other people within your company to book trips and enter expenses for you.

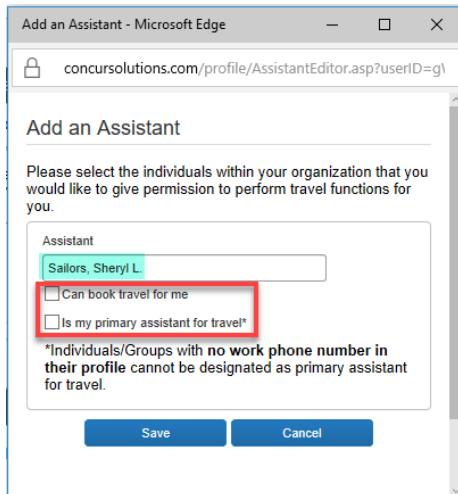
Click on **Add an Assistant**.

The screenshot shows the 'Assistants and Travel Arrangers' page. The top navigation bar includes 'Go to top'. The main content area is titled 'Assistants and Travel Arrangers' and contains a message: 'Please select the individuals within your organization that you would like to give permission to perform travel functions for you.' There is a checkbox for 'Refuse Self Assigning Assistants'. Below this is a table titled 'Your Assistants and Travel Arrangers' with a single entry: 'Davids, Julie A.' and a status 'Can book travel? '. To the right of the table is a red box highlighting the '+ Add an Assistant' button. At the bottom of the page is a 'Save' button.

A pop-up window will appear. Search for and select the individual(s) to assign as a travel assistant. Select the checkbox(es) to allow them to book travel for you or assign them as a primary travel assistant. Click on **Save**.

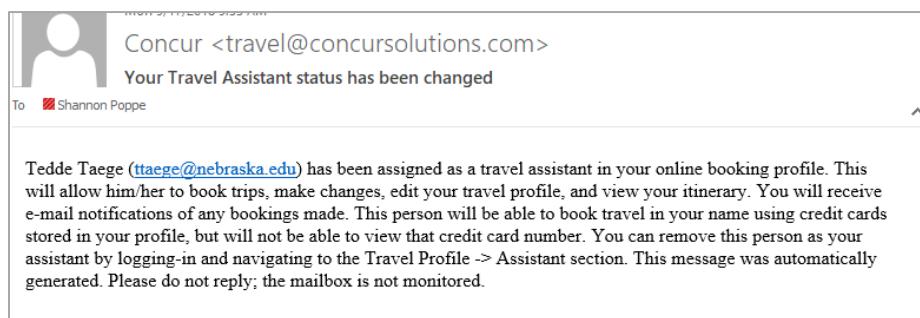


Tip: Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.



Email notifications will be sent to the traveler and the travel assistant regarding the update in Concur.

Traveler email:



Travel assistant email:

