# What's the difference between a Travel Arranger and an Expense Delegate?

Travel Arranger – This individual can make travel reservations for another employee or a guest traveler.

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

How to Assign a Request or Expense Delegate:

Go to your Profile Settings.
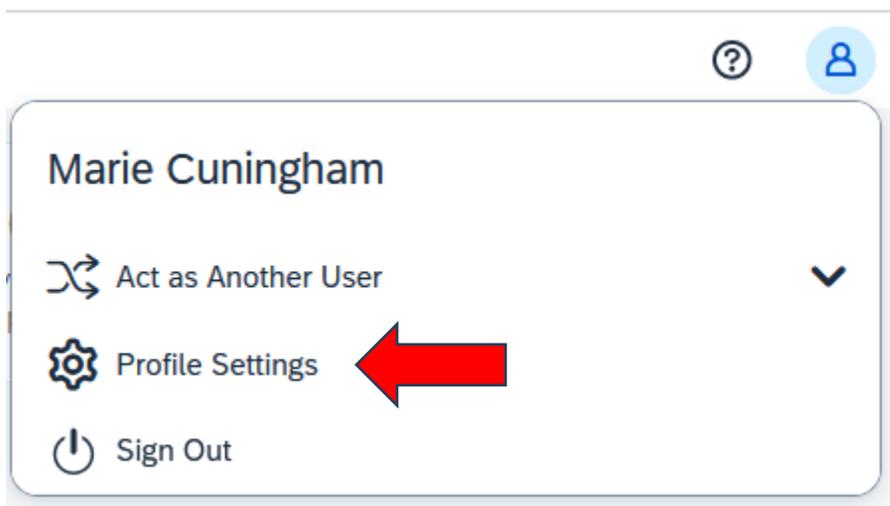
Select "Expense Delegates."

Profile Options

Select one of the following to customize your user profile.

Personal Information
Your home address and emergency contact information.

Company Information
Your company name and business address or your remote location address.

Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Request Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Concur Mobile Registration
Set up access to Concur on your mobile device

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Click the Add button

Expense Delegates

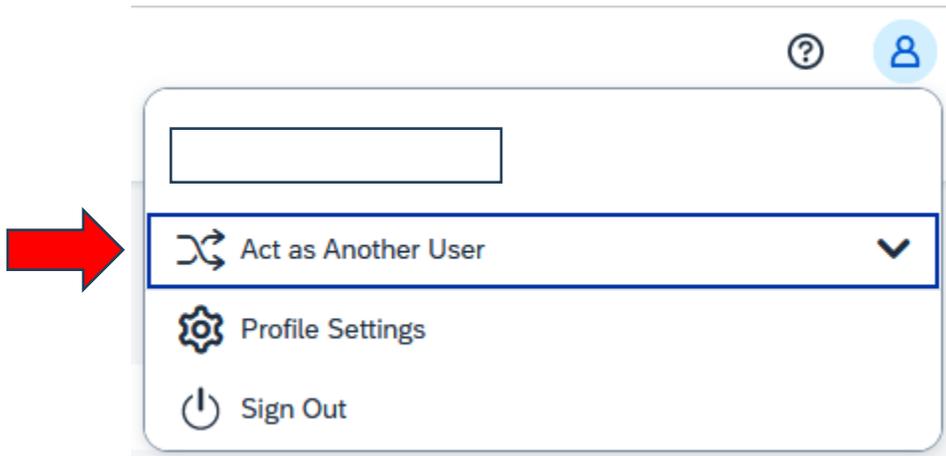Delegates | Delegate For

[Add] [Save] [Delete]

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

☐	Name	Can Prepare	Can View Receipts	Receives Emails

No records found.

Search for the name of the employee you wish to be your delegate.

Select the permissions you want your delegate to have, and then click the Save button.

Once the employee is selected and the permissions granted, the delegate will be able to complete preapproval Requests and Expense reports.

The delegate can now go their Profile Settings and click "Act on Behalf of Another User." Type the first few letters of the traveler's last name and select. Click the Start Session button.
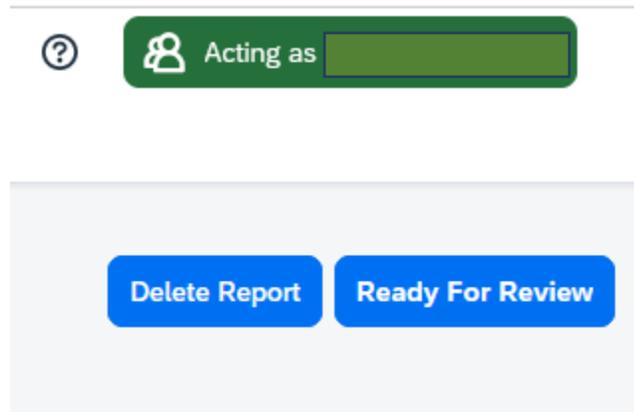

The Delegate will now see that they are acting on behalf of the traveler, and can create a Travel Request or Expense Report on behalf of the traveler.
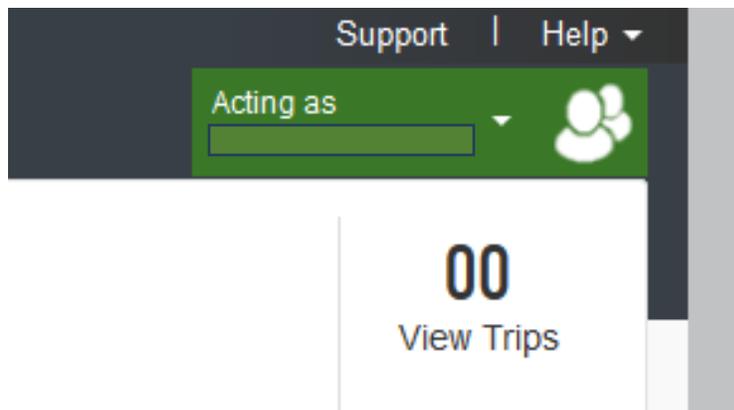
IMPORTANT:

Delegates can create preapproval Requests and Expense reports for travelers, but they **cannot** "Submit" the report for the traveler. When the delegate has completed a report, they must click "Ready for Review."

The traveler will receive a notice that their preapproval Request or Expense report is ready for review. Once the traveler has reviewed the report, they must "Submit" the report themselves due to the certification that they must accept.