


DELEGATE

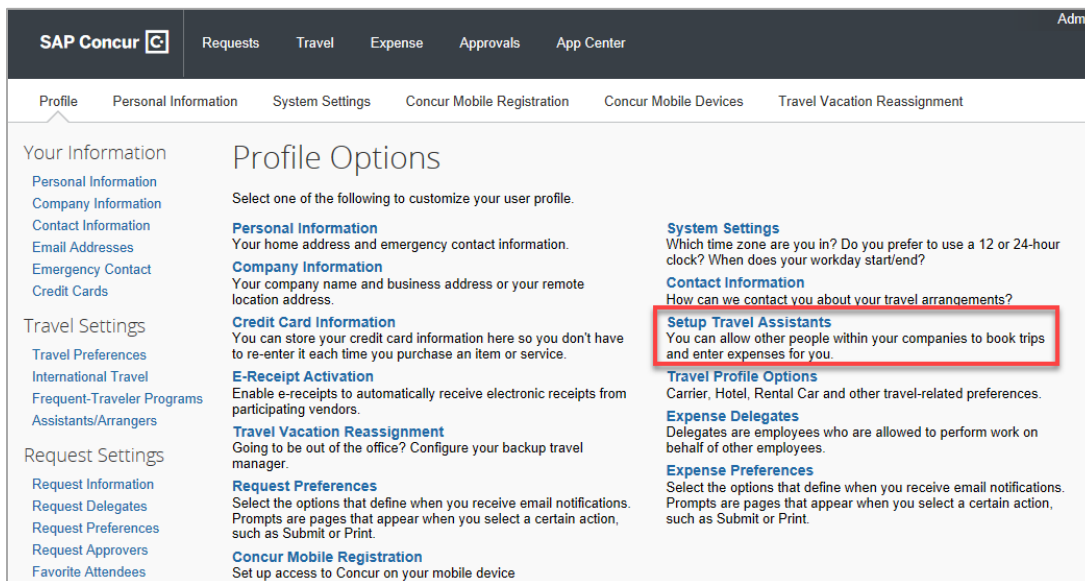
A delegate in Concur can prepare travel requests (pre-trip authorization), expense reports, and be a substitute approver (if applicable). Review the quick reference guides on [Assign a Delegate](#) and [Act as a Delegate](#).

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

TRAVEL ASSISTANT

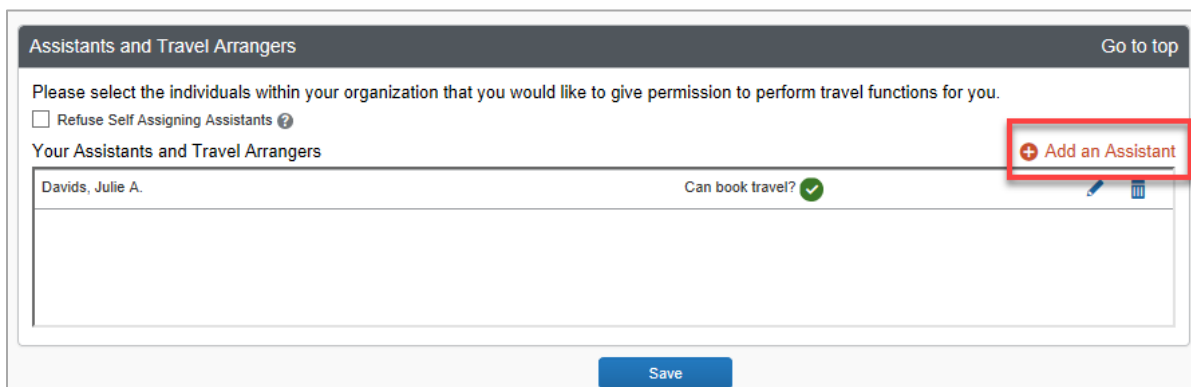
A travel assistant in Concur is given permission to book travel for a traveler. Follow the instructions below to assign a travel assistant.

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 user interface. At the top, there are navigation tabs for Requests, Travel, Expense, Approvals, and App Center. Below that, a sub-navigation bar includes 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, Company, Contact, Email, Emergency, Credit Cards), "Travel Settings" (Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers), and "Request Settings" (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendeess). The "Assistants/Arrangers" section is highlighted with a red box, and the "Setup Travel Assistants" link is also highlighted with a red box. Other sections include "Personal Information", "Company Information", "Credit Card Information", "E-Receipt Activation", "Travel Vacation Reassignment", "Request Preferences", and "Concur Mobile Registration".

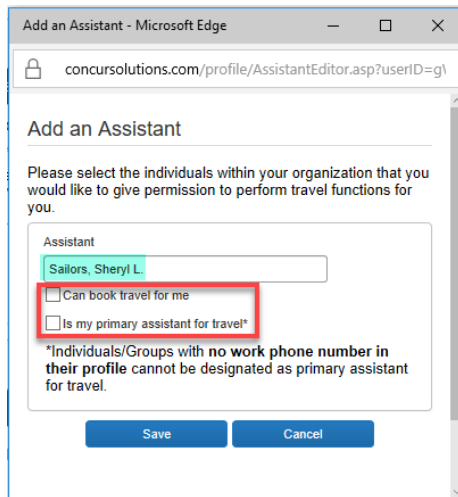
Click on  **Add an Assistant**.



The screenshot shows the "Assistants and Travel Arrangers" page. At the top, there is a "Go to top" link. Below that, there is a heading "Please select the individuals within your organization that you would like to give permission to perform travel functions for you." and a checkbox for "Refuse Self Assigning Assistants". The main section is titled "Your Assistants and Travel Arrangers" and contains a table with one row: "Davids, Julie A." and "Can book travel?" with a green checkmark. A red box highlights the "+ Add an Assistant" button in the top right corner of the table. At the bottom of the page, there is a "Save" button.

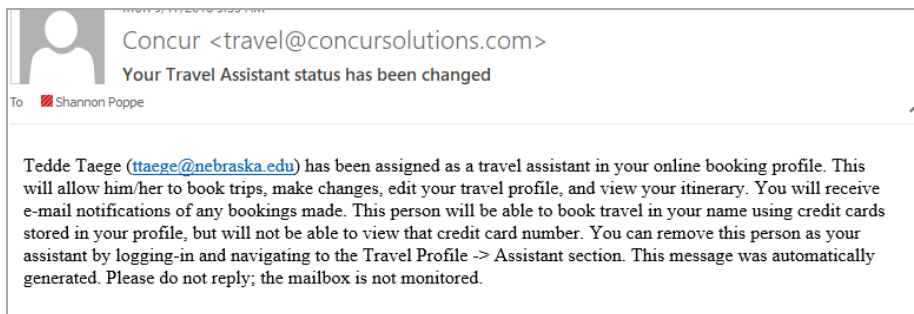
A pop-up window will appear. Search for and select the individual(s) to assign as a travel assistant. Select the checkbox(es) to allow them to book travel for you or assign them as a primary travel assistant. Click on **Save**.

 **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:

