# DELEGATE VS. TRAVEL ASSISTANT

DELEGATE IN FIREFLY

A delegate in Firefly can prepare non-travel expense reports, 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; the employee/traveler needs to submit.

TRAVEL ASSISTANT IN CONCUR

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*.
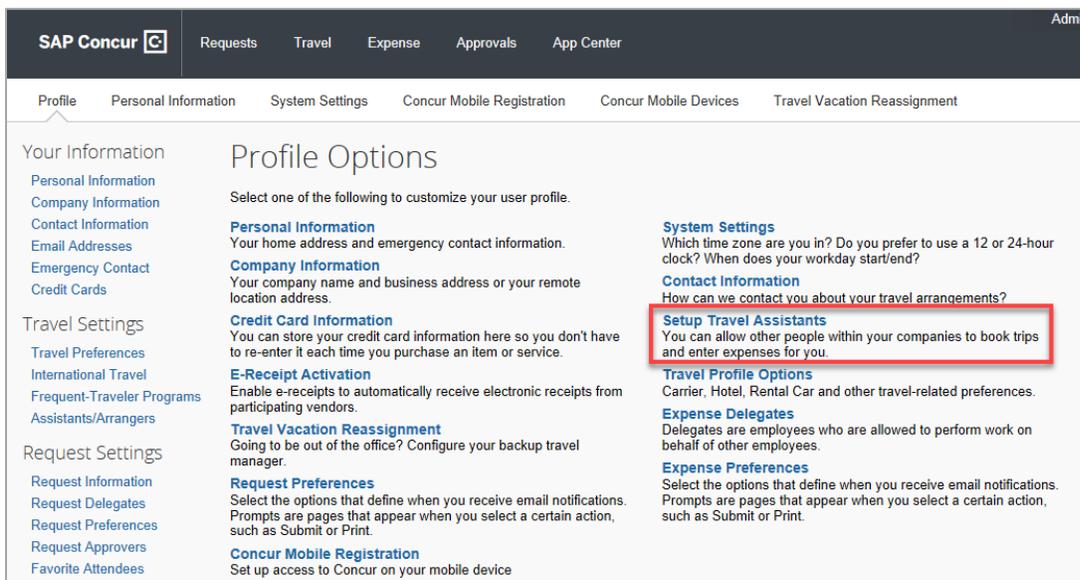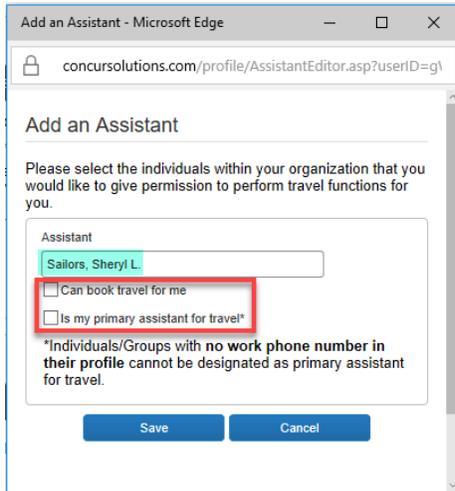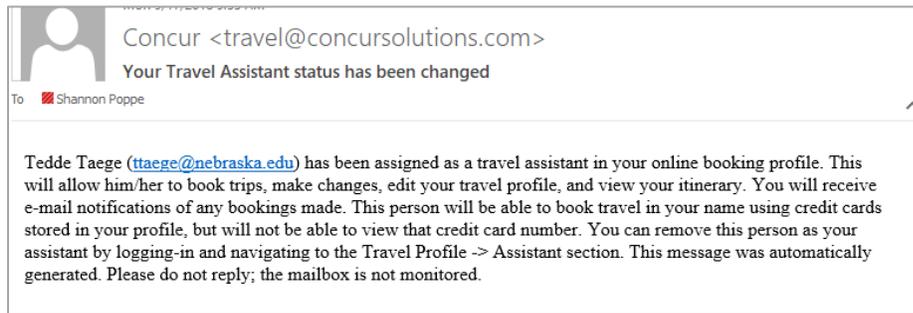

Click on ⊕ Add an Assistant.
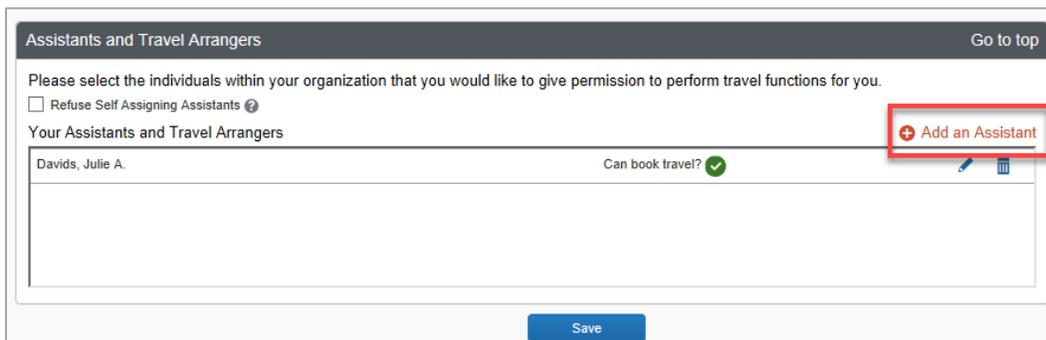
A pop-up window will appear. Search for and select the individual(s) to assign as a travel assistant. Select the checkbox(es) to allow them to book travel for you or assign them as a primary travel assistant. Click on **Save**.

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

Notifications will be sent to the traveler and the travel assistant per the update in Concur.

Traveler email:

Concur <travel@concursolutions.com>
Your Travel Assistant status has been changed
To: Shannon Poppe

Tedde Taege (ttaege@nebraska.edu) has been assigned as a travel assistant in your online booking profile. This will allow him/her to book trips, make changes, edit your travel profile, and view your itinerary. You will receive e-mail notifications of any bookings made. This person will be able to book travel in your name using credit cards stored in your profile, but will not be able to view that credit card number. You can remove this person as your assistant by logging-in and navigating to the Travel Profile -> Assistant section. This message was automatically generated. Please do not reply; the mailbox is not monitored.

Travel assistant email:

From: Concur [mailto:travel@concursolutions.com]
To: Tedde Taege <ttaege@nebraska.edu>
Subject: Your Travel Assistant status has been changed

You have been added as a travel assistant for Shannon M Poppe (smpoppe@nebraska.edu). This will allow you to book trips, make changes, edit their travel profile, and view their itinerary. They will receive e-mail notifications of any bookings made. You will be able to book travel in their name using credit cards stored in their profile, but will not be able to view that credit card number. This message was automatically generated. Please do not reply; the mailbox is not monitored.