

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

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

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

How to Assign a Request or Expense Delegate:

Go to your Profile Settings.



Test-1 T Traveler-1

[Profile Settings](#) | [Sign Out](#)



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.

Change Password

Change your password.

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.

Mobile Registration

Set up access to Concur on your mobile device

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

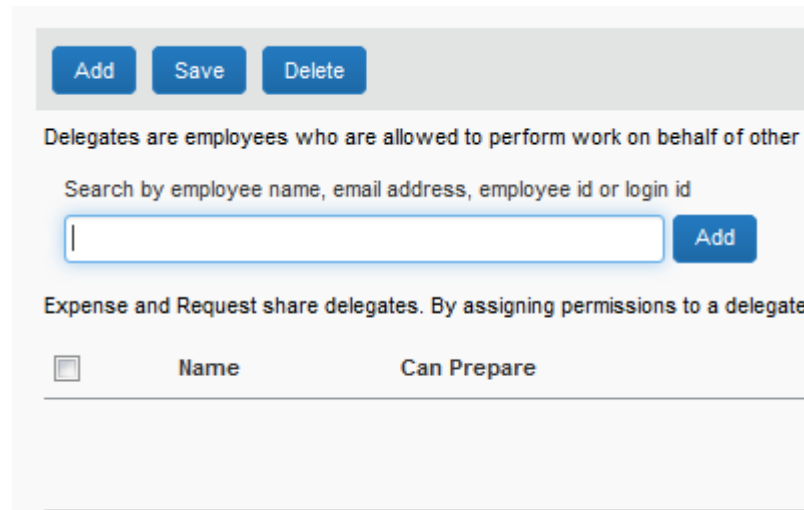
Can Prepare

Can View Receipts

Receives Emails

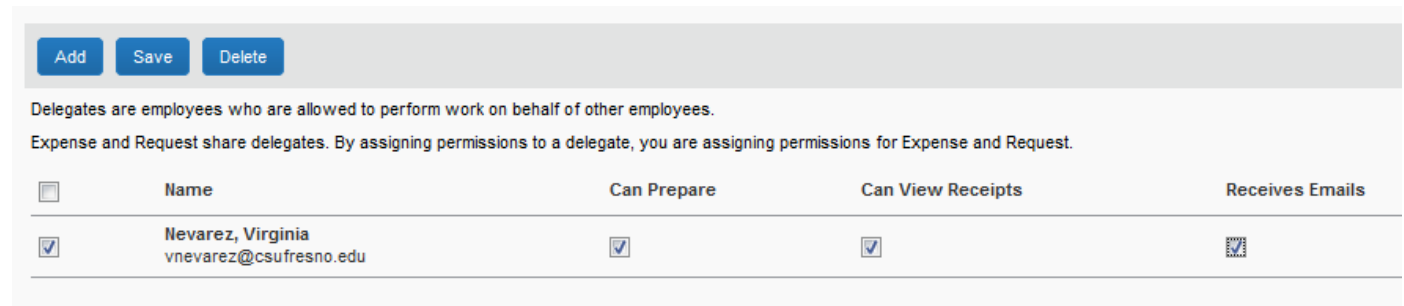
No records found.

Type the first few letters of the last name of the employee you wish to be your delegate.



The screenshot shows a web interface for managing delegates. At the top, there are three buttons: "Add", "Save", and "Delete". Below these buttons, a text box contains the instruction: "Delegates are employees who are allowed to perform work on behalf of other employees." Underneath, there is a search prompt: "Search by employee name, email address, employee id or login id". A search input field is present with a blue "Add" button to its right. Below the search field, there is another instruction: "Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request." At the bottom, a table header is visible with columns: a checkbox, "Name", and "Can Prepare".

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

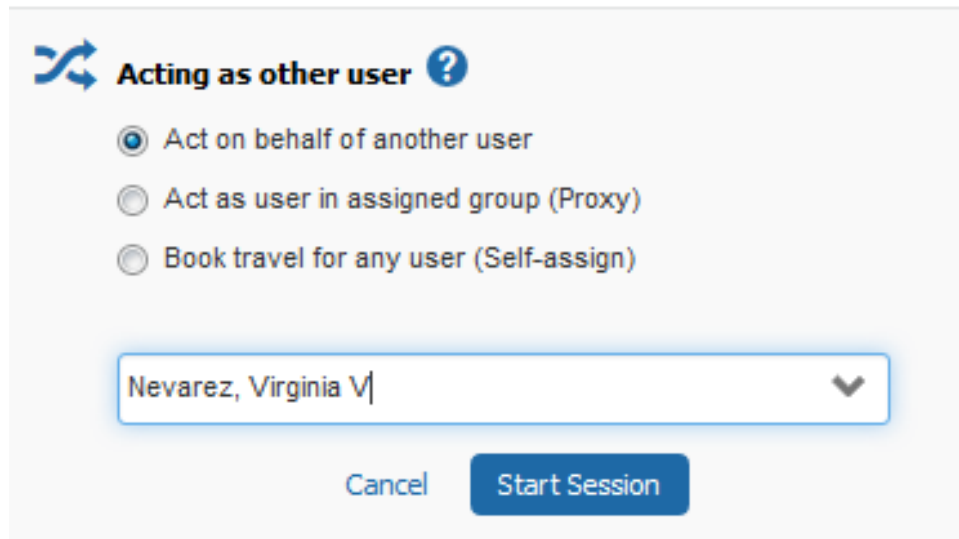


The screenshot shows the same web interface as above, but now with a table of delegates. The table has four columns: a checkbox, "Name", "Can Prepare", "Can View Receipts", and "Receives Emails". One delegate is listed: "Nevarez, Virginia" with email "vnevarez@csufresno.edu". All four permission checkboxes for this delegate are checked.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input checked="" type="checkbox"/>	Nevarez, Virginia vnevarez@csufresno.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

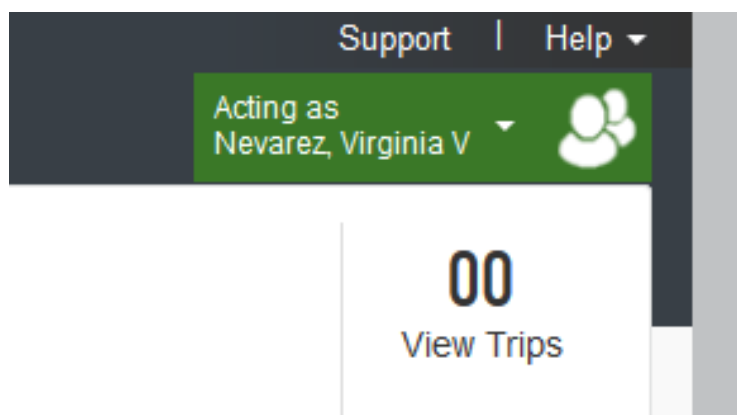
Once the employee is selected and the permissions granted, the employee will be able to act on behalf of the traveler.

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.



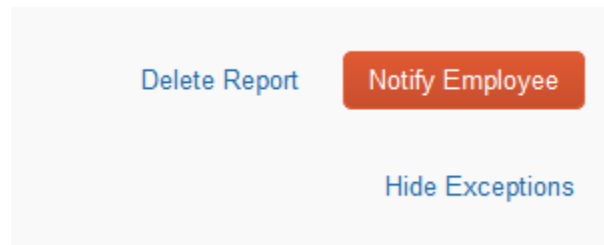
The screenshot shows a dialog box titled "Acting as other user" with a question mark icon. It contains three radio button options: "Act on behalf of another user" (which is selected), "Act as user in assigned group (Proxy)", and "Book travel for any user (Self-assign)". Below the options is a search input field containing the text "Nevarez, Virginia V" and a dropdown arrow. At the bottom of the dialog are two buttons: "Cancel" and "Start Session".

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 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.”



The traveler will receive a notice that their Travel Request or Expense Claim 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.

Final Review



Certification Agreement

I certify that the claim submitted is a true statement of the travel expenses incurred by me while traveling on official University business. All required documents are attached herein. I have received the appropriate authorization to travel and am aware of the CSU travel guidelines related to this expense. I will not seek reimbursement for a duplicate claim or from any other source. I agree to return any reimbursement or payment issued by the University which subsequently results in a refund, within 30 days of its receipt. If a motor vehicle was operated in the course of this claim, it was done so in full compliance of California state laws and CSU policy."

Accept & Submit

Cancel