

# Acting as a Delegate or Travel Arranger

## What is a Delegate?

A delegate is an individual authorized to process reports, on behalf of another person.

There are two types of delegates:

- A *Prepare Delegate* can prepare reports for another individual.
- An *Approve Delegate* can approve reports on behalf of another individual.

## What is a Travel Arranger?

A travel arranger (also called travel assistant) is an individual authorized to book travel, on behalf of another person.



*Delegates are assigned for report processing, while travel arrangers are assigned for travel processing. Delegates and travel arrangers are not the same individuals. You can just be a delegate, a travel arranger or both a delegate and a travel arranger.*

If you have been assigned as a delegate or travel arranger follow these steps:

1. Login to [www.concursolutions.com](http://www.concursolutions.com)
2. In My Concur page go to the upper left corner of your screen and you will see the notation **You are administering for Yourself** next to your name.
3. Click on the **Yourself** link and the **Select User to Administer** box will open up.
4. From the dropdown list located on the right hand side of the box, select a name from the list.

The drop down menu **ONLY** displays the names of the individuals that have authorized you to act on their behalf.

The screenshot shows the top navigation bar of the Concur system. The user is logged in as Cristina Salas. A red box highlights the text "[ You are administering for: Yourself ]" next to the user name, with the number "2 & 3" above it. Below this, a "Select User to Administer" dialog box is open. A red box highlights the dropdown menu in this dialog, which currently shows "Me", with the number "4" above it. The dialog also includes "Search" and "Proxy Search" buttons. At the bottom of the page, a navigation menu contains links for "My Concur", "Request", "Travel", "Expense", "Reporting", "Administration", "Profile", and "App Center".

Once an individual is selected, the My Concur page will display only the sections you are authorized to access.

After completing the reports and/or travel arrangements, follow the same steps to go back to your personal profile.