In SAP Concur, **Delegates** and **Travel Assistants** (or Travel Arrangers) have distinct roles and responsibilities when acting on behalf of another user.

Delegate (Request/Expense Delegate):
- Focus: Primarily handles expense-related tasks and travel requests.
- **Responsibilities:**
  - Prepares travel requests (pre-trip authorization).
  - Prepares expense reports (including P-card and travel reconciliation reports).
  - Reviews requests and reports before approval.
  - May receive Concur emails on the traveler's behalf.
  - In some cases, can be granted approval authority, especially if they already have approval rights and a similar or higher job classification.
- **Cannot:**
  - Book travel (unless also assigned as a Travel Assistant/Arranger).
  - Submit requests or expense reports (typically, the traveler must submit).
  - Self-assign as a delegate or arranger for someone else.
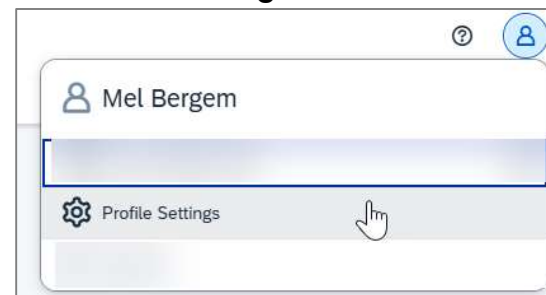
Travel Assistant/Arranger:
- Focus: Primarily handles travel arrangements.
- Responsibilities:
  - Books travel, such as flights, hotels, and rental cars, on behalf of another user.
  - Can view and modify the traveler's Concur travel profile.
  - Can view the traveler's upcoming trips, regardless of how they were booked.
- Cannot:
  - Prepare or submit expense reports.
  - Receive expense-related emails (unless assigned as a Delegate).

GETTING STARTED
Log in to **Concur** (available via myCI as CSUCI Travel)
You will be taken to the Concur home page

SETTING UP YOUR ASSISTANT(S)
From the Concur homepage, click **Profile (upper right corner)**, then **Profile Settings**.
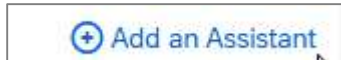
Under Travel Settings select Assistants/Arrangers

Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers

Click to Add an Assistant (on the right)
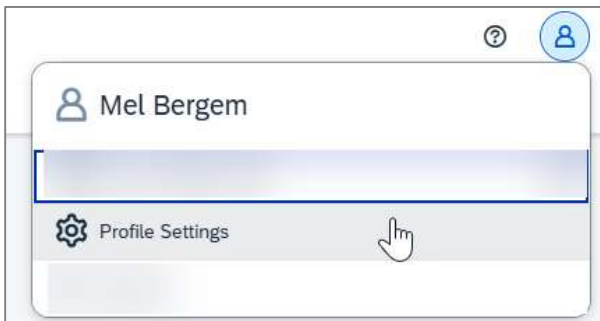
⊕ Add an Assistant

Begin entering the name of the Assistant in the space provided and when the correct name appears click on it. Check the box for "Can book travel for me." and select Save. If you have multiple assistants, you may designate a primary.

SETTING UP YOUR DELEGATE(S)

From the Concur homepage, click **Profile (upper right corner)**, then **Profile Settings**.

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⚙ Profile Settings   🖑

Under Request Settings click on Request Delegates.

Request Settings
Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees

Select Add and begin entering the name in the space provided. Select the correct name. Check the boxes for "Can Prepare" and "Receives Emails." Click Save.

While still in your Profile, select Expense Delegates under Expense Settings.

Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Personal Car
Favorite Attendees
Expense Credit Cards

The same Request Delegates should appear.

QUESTIONS? CONTACT: Travel@csuci.edu