

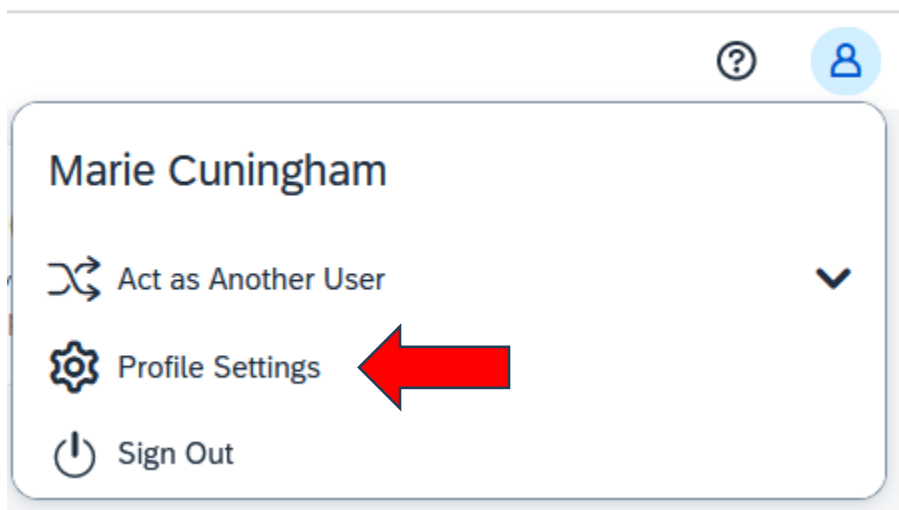
What's the difference between a Travel Arranger and an Expense Delegate?

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

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

How to Assign a Travel Arranger:

Go to your Profile Settings.



Select “Setup Travel Assistants.”

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.

Concur Mobile Registration

Set up access to Concur on your mobile device

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.

Click “Add an Assistant”

Assistants and Travel Arrangers

[Go to top](#)

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers

 [+ Add an Assistant](#)

You currently have no assistants defined.

Search for the name of the employee you wish to be your Travel Arranger.

Assistants and Travel Arrangers

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Traveler1, Test

- Traveler1, Test**
Traveler1@csufresno.edu
- Traveler-1, Test-1 T.**
traveler@csufresno.edu
559-123-4567

Credit Cards

You currently have

permitted to perform travel functions. No assistants defined.

ne designated

dit cards saved.

It's important to select the permission button to allow the Travel Arranger to make reservations for the traveler. Then click the Save button.

Assistants and Travel Arrangers

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Traveler1, Test

Can book travel for me

Is my primary assistant for travel*

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

Save Cancel

Credit Cards

You currently have

The Travel Arranger can now go their Profile Settings and click “Act on Behalf of Another User.” Search for the traveler’s name and select.

