Concur Tips and Tricks

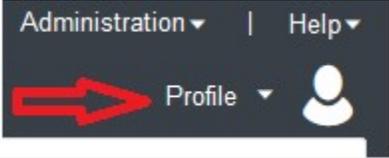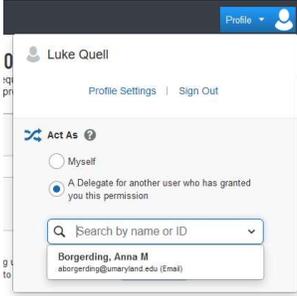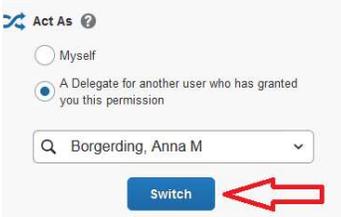## Acting as a delegate or travel assistant

There are three types of roles in Concur where a person "acts on behalf of" another person.

Traveler Delegate – this person creates Travel Requests and Expense Reimbursements on behalf of any traveler.

Travel Assistant- this person books travel or has access to the trip details on behalf of any traveler

Approver Delegate – this person approves Travel Requests or Expense Reports on behalf of any approver

If you are a delegate or travel assistant, you act on behalf of another user in Concur. To do that you need to "start a session" as them through Concur. You can follow these steps:

Step 1 – Log into Concur	Step 2 – Open your Profile
From your myUMB portal page, click the Concur Travel & Expense icon. **Concur Travel & Expense (For Pilot Groups)**	Select the Profile icon in the top right hand corner of Concur.
Step 3 – Select a User	Step 4 – Switch to That User
Select the user that delegated to you. 	Select the Switch button.
Step 5 – Complete the Task	Step 6 – End the session
Once you are acting as the user that established you as a delegate or travel assistant, their name will be in green in the top right hand corner of your Concur screen. Now you can complete your approvals, Travel Requests, Expense Reimbursements, or travel bookings.	After you are done you should select "Switch" to end the session.