

– Concur Travel * Client Fact Sheet – Delegate/Proxy/Assistant/Arranger March 27, 2023

First, Definitions

NOTE: Your company may or may not use all of these roles/permissions.

Delegate and Travel Assistant/Arranger

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DELEGATE – APPLIES TO EXPENSE, REQUEST, AND INVOICE

A *delegate* is typically chosen by a user to assist that user with expense reports, approvals, requests, etc. A delegate can also be assigned to a user by the User Admin (or via import).

TRAVEL ASSISTANT/ARRANGER – APPLIES TO TRAVEL

A *travel assistant/arranger* is like a *delegate*. The assistant/arranger is chosen by a user to assist that user with travel, profile changes, etc. An assistant/arranger can also be assigned to a user by the User Admin (or via import).

NOTE: Technically, the difference between an *assistant* and an *arranger* is that – for the arranger – the **Can book travel** check box is enabled in Profile. If the **Can book travel** check box not enabled, the assistant can only assist that user with profile management.

Proxy and Self-Assigning Travel Assistant

PROXY – APPLIES TO EXPENSE, REQUEST, AND INVOICE

A *proxy* assists but is **not** chosen by the user, for example, they might be a group assistant or Help Desk staff that accesses the user's information in case of emergency. Instead of being selected by the user, the person is assigned the Proxy role by the User Admin (or via import).

When the role is assigned, the proxy is also assigned to a particular group of employees – if the company uses groups in addition to the global group. If the company uses only the global group, then the proxy can work on behalf of anyone in the company.

SELF-ASSIGNING ASSISTANT – APPLIES TO TRAVEL

A *self-assigning travel assistant* is essentially a *travel arranger* (can book travel). The only difference is that a self-assigning assistant is **not** chosen by the user; for example, they might be Help Desk staff that accesses the user's information in case of emergency. Instead of being selected by the user, the person is assigned the Self-assigning Assistant permission by the User Admin.

NOTE: Even though the name is self-assigning *assistant*, this user is actually an *arranger* (can book travel).

If the company uses Divisional View, then the self-assigning assistant can work for users only within the same Divisional View as their own. If the company does not use Divisional View, then the self-assigning assistant can access the information for anyone in that company.

! **EXCEPTION:** In Profile, if a user selects the **Refuse Self Assigning Assistants** check box, then self-assigning assistants cannot access that user's information.

What the Delegate/Proxy/Assistant/Arranger Sees

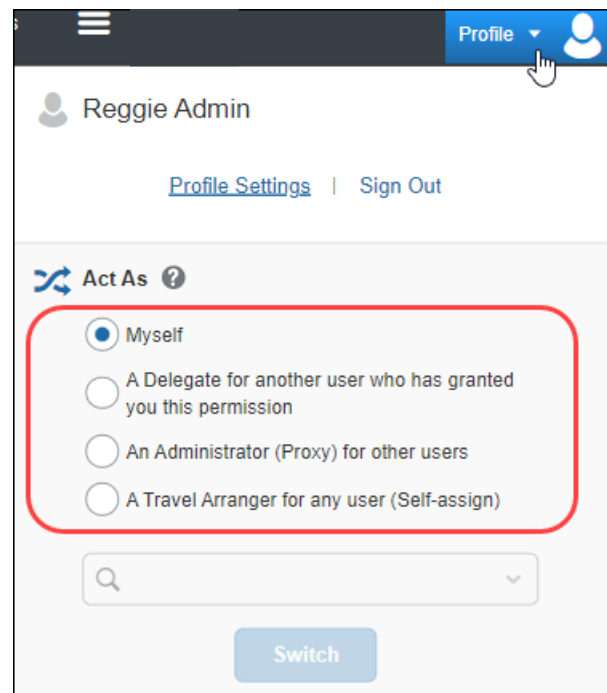
Find a User (Candidate)

A delegate/proxy/assistant/ arranger accesses their list of users (candidates) via Profile, using the **Act As** list.

First, they click the appropriate option (if more than one appears).

Then, to find a candidate:

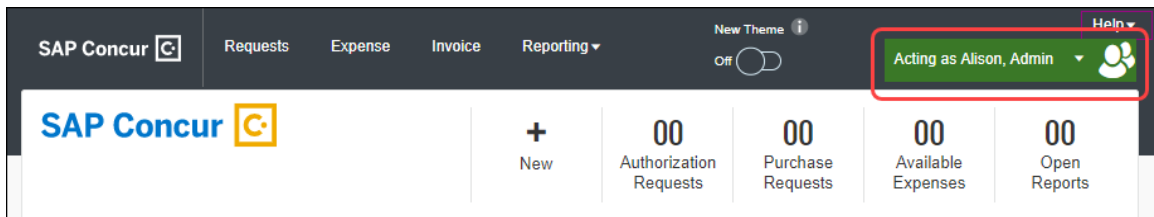
- For the delegate/proxy/ assistant/arranger:
 - ♦ With **more than 30** candidates, when they click the field, the 10 most recently used candidates appear. They can type a few letters of a candidate's name. Up to 80 candidates that meet that criteria appear in the list. The delegate/proxy/assistant/ arranger can type First, Last or Last, First for a better match.
 - ♦ With **less than 30** candidates, when they click the field, all candidates appear. They can type a few letters of the candidate's name if desired.



- For the **self-assigning travel assistant**, when they click the field, the 10 "most recently used" candidates appear. They can type a few letters of a candidate's name. Up to 80 candidates that meet that criteria appear in the list. The assistant can type First, Last or Last, First for a better match.

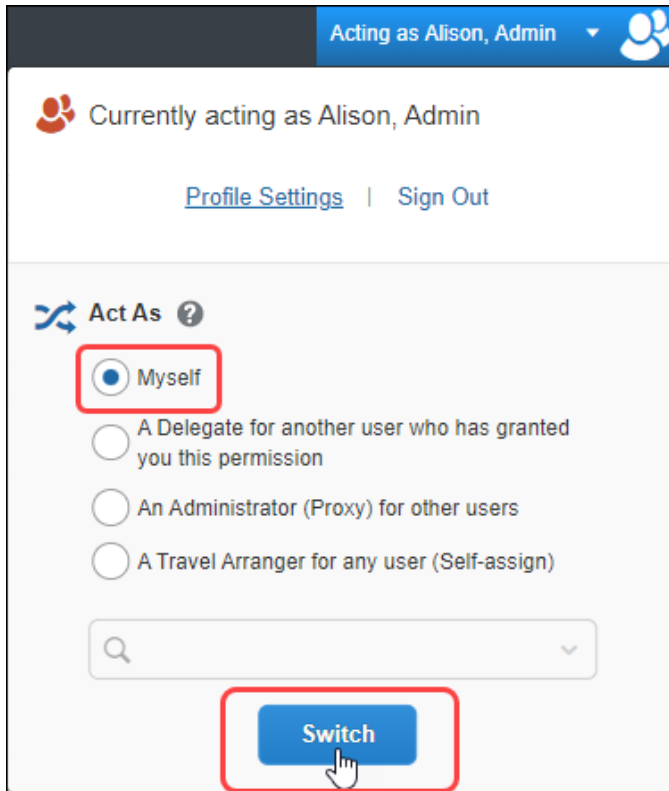
The delegate/proxy/assistant/arranger clicks the name of the desired candidate and then clicks **Switch**.

The **Profile** menu turns green, then becomes **Acting as <name>** and the single "user" icon becomes a double "user" icon.



End Session

To stop working on behalf of another, the delegate/proxy/assistant/arranger clicks **Acting as <name>**, selects **Myself** from the **Act As** list, and then clicks **Switch**.



The screenshot shows a user interface for managing session roles. At the top, a blue header bar displays 'Acting as Alison, Admin' next to a user icon. Below this, a white box contains the text 'Currently acting as Alison, Admin' with a red person icon. Underneath are links for 'Profile Settings' and 'Sign Out'. The main section is titled 'Act As' with a question mark icon. It features four radio button options: 'Myself' (which is selected and highlighted with a red box), 'A Delegate for another user who has granted you this permission', 'An Administrator (Proxy) for other users', and 'A Travel Arranger for any user (Self-assign)'. Below these options is a search bar with a magnifying glass icon and a dropdown arrow. At the bottom, a blue 'Switch' button is highlighted with a red box, and a hand cursor is shown clicking it.

Switch Candidates

To work for another candidate, the delegate/proxy/assistant/arranger does not have to exit the existing session first. Instead, they can find another candidate and click **Switch**.

Preferred Name

If a preferred name is included in the user's profile, when acting as a Travel Arranger for the user, the user's preferred name is listed in the search results.

Preferred Name in My Profile

My Profile - Personal Information

Jump To: Personal Information Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

Important Note
Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title [Required]	First Name [Required]	Middle Name	Preferred Name	Last Name [Required]	Suffix
Prof Ms	Jaunita		Nita	Parker	

☐ No Middle Name

The name of the person you are choosing to assist or act on behalf of now shows preferred name in the autocomplete result list.

Reggie Admin

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

Act As ?

- ☐ Myself
- ☐ A Delegate for another user who has granted you this permission
- ☐ An Administrator (Proxy) for other users
- ☒ A Travel Arranger for any user (Self-assign)

Search:

Nita Parker

parker@debs_standard_entity1.com (Login ID)
parker@debs_standard_entity1.com (Email)
555-555-1111

Revision History

Date	Notes / Comments / Changes
March 27, 2023	Updated Profile menu sections to reflect March '23 release updates to Act As list.
February 17, 2023	Added section on <i>Preferred Name</i> .
December 06, 2019	Removed "pause" feature; the Pause Delegation feature has been retired as of December 2019.
July 27, 2018	Changed one screen shot; no content change
October 14, 2015	Changed in the user interface; added "pause"
July 20, 2015	Initial publication

