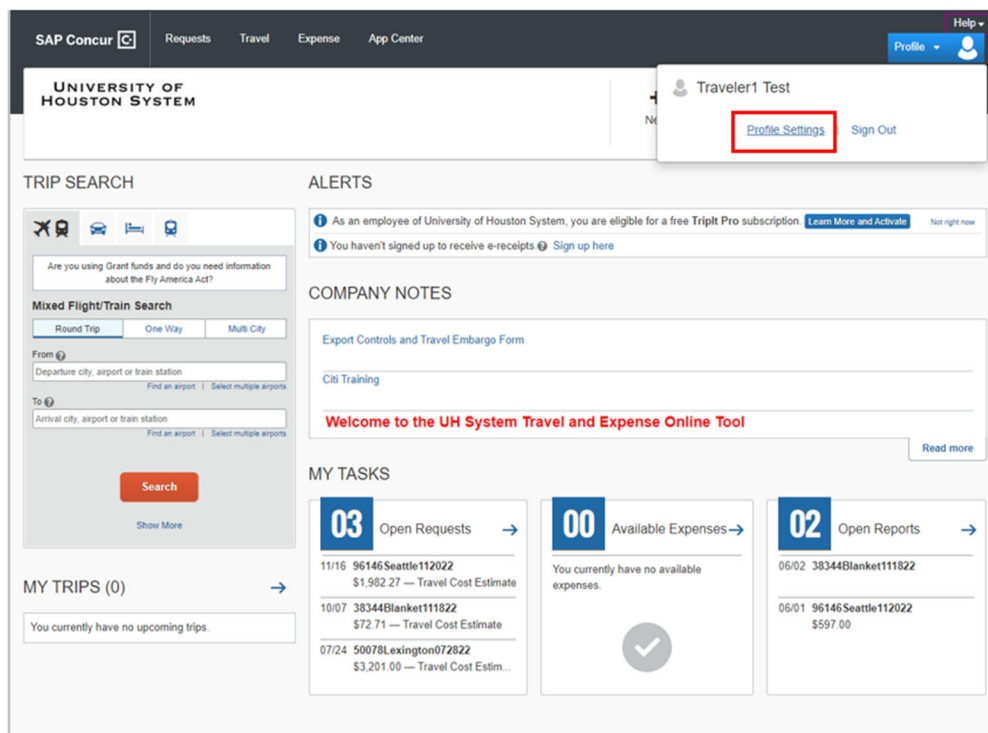


Using Delegates

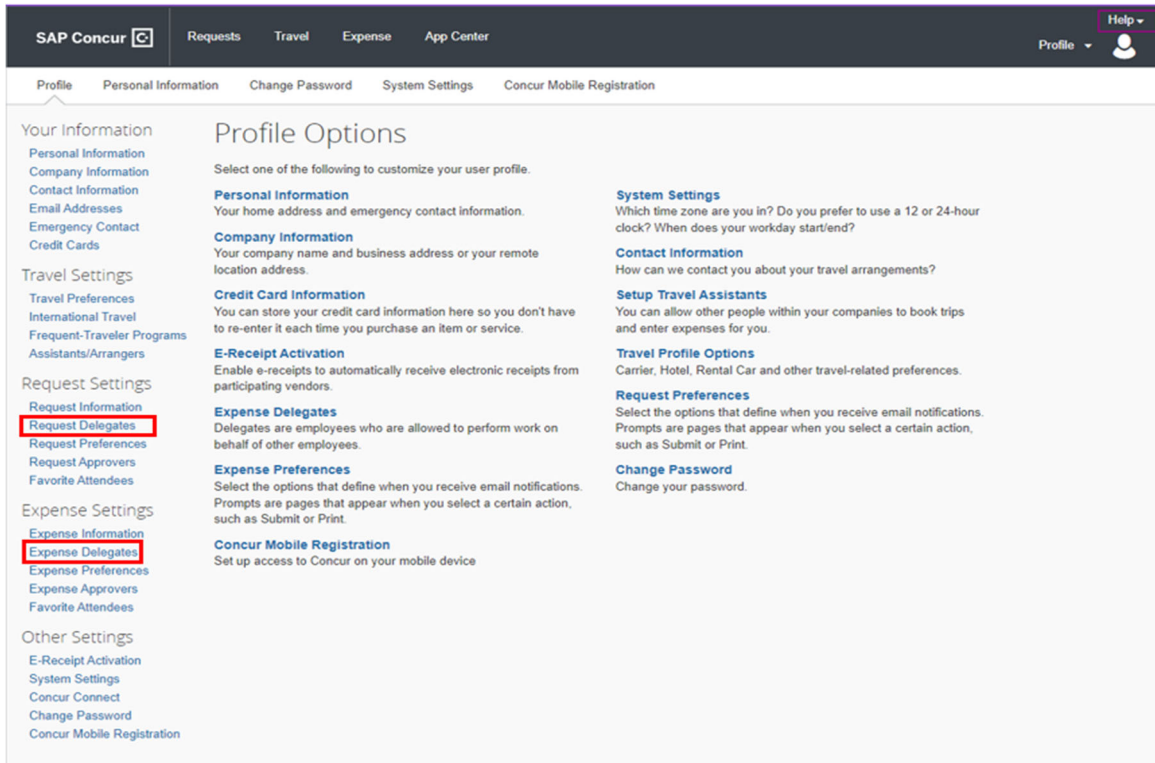
A traveler may assign a delegate to *create* their travel request and expense reports for them. They may also have the delegate view receipts and receive emails on their behalf. The permissions provided to the delegate depend on how the traveler sets up their profile; delegates may have fewer permissions than the traveler. **It is the traveler's ultimate responsibility to submit these requests and reports. The delegate does *not* have permission to submit requests or expense reports on behalf of the traveler.**

Selecting A Delegate

Select Profile and then Profile Settings

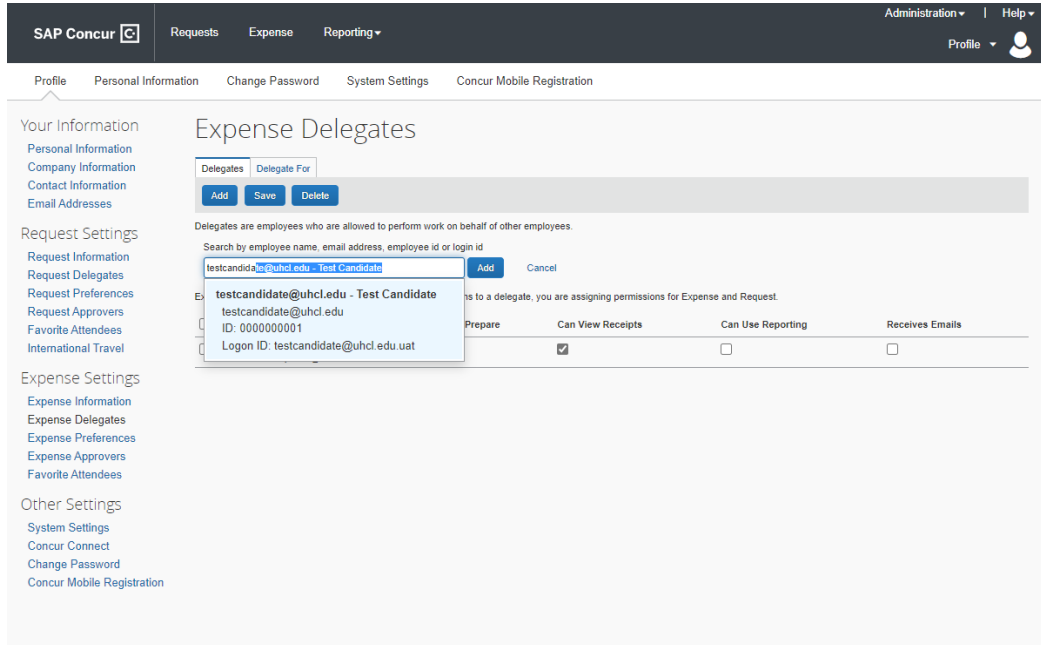


Click Expense or Request Delegates.



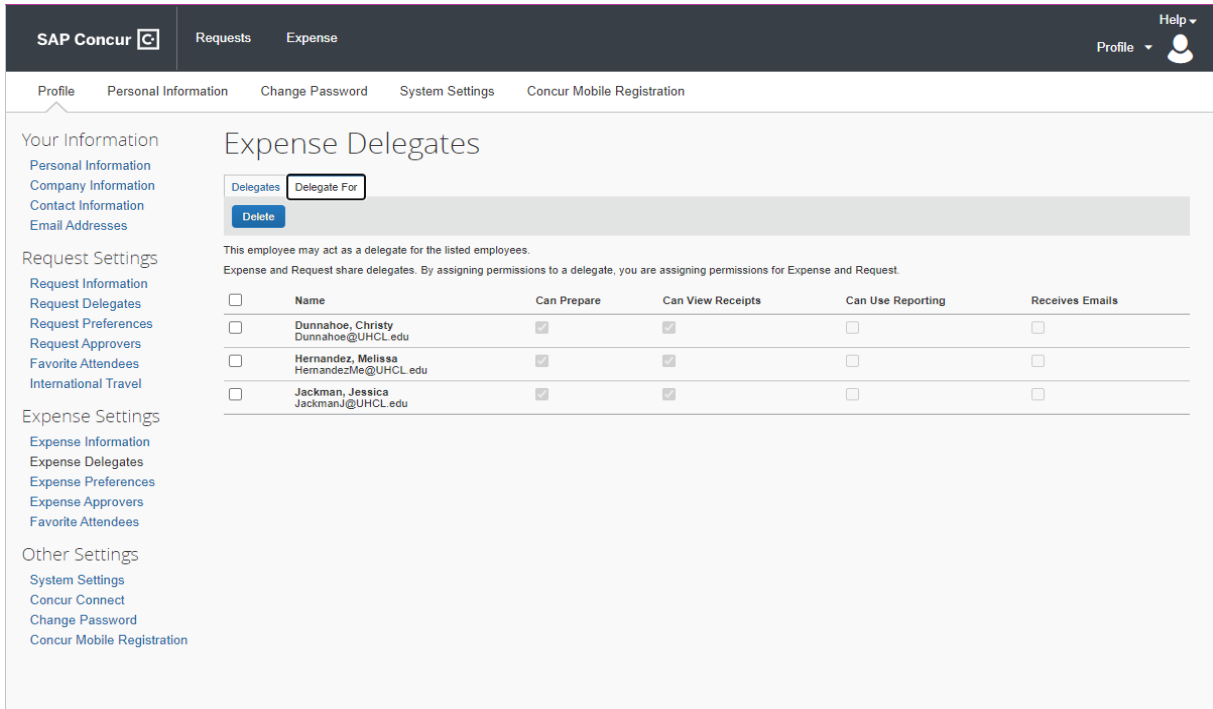
The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Requests', 'Travel', 'Expense', and 'App Center' tabs. On the right, there is a 'Profile' dropdown menu and a 'Help' button. Below the navigation bar, there is a sub-navigation bar with 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration' options. The main content area is titled 'Profile Options' and contains several sections: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards), 'Travel Settings' (Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees), 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees), and 'Other Settings' (E-Receipt Activation, System Settings, Concur Connect, Change Password, Concur Mobile Registration). The 'Request Delegates' and 'Expense Delegates' links in the left sidebar are highlighted with red boxes. The main content area also includes sections for 'Personal Information', 'Company Information', 'Credit Card Information', 'E-Receipt Activation', 'Expense Delegates', 'Expense Preferences', 'Concur Mobile Registration', 'System Settings', 'Contact Information', 'Setup Travel Assistants', 'Travel Profile Options', 'Request Preferences', and 'Change Password'.

Click Add and then a search bar will appear. You can look up by last name, email address, employee id or login. Once you have the delegate selected then **Click Add**.



Note: The traveler will need to complete this delegate set-up process for both travel request and expense reporting activities. A person who seeks to assist a traveler without having been set up as a delegate in advance by the traveler will not be able to create transactions in Concur.

Click Delegate to see which travelers have given permission to delegate on their behalf.



The screenshot shows the SAP Concur user interface for the 'Expense Delegates' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', and 'Help'. Below this, a secondary navigation bar lists 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration'. The left sidebar contains a menu with categories: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees, International Travel), 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees), and 'Other Settings' (System Settings, Concur Connect, Change Password, Concur Mobile Registration).

Expense Delegates

Delegates **Delegate For** [Delete](#)

This employee may act as a delegate for the listed employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	Dunnahoe, Christy Dunnahoe@UHCL.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Hernandez, Melissa HernandezMe@UHCL.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Jackman, Jessica JackmanJ@UHCL.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

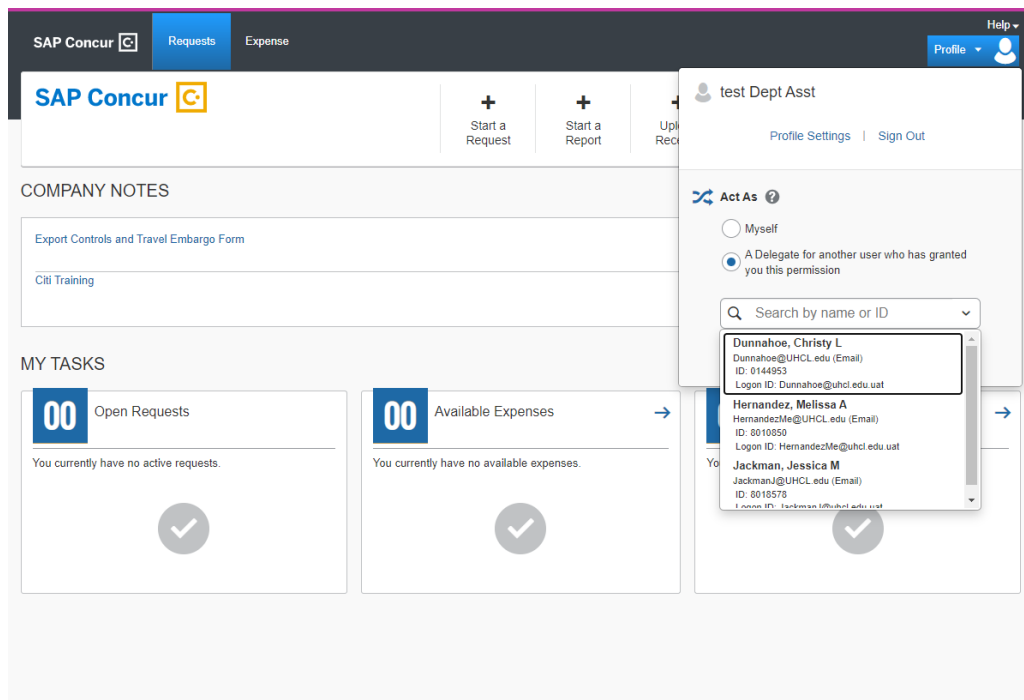
Delegate Role

To **assume the Delegate role** (after the traveler has created your delegate role) you must also create a connection to your traveler within Concur.

It is a 2-way process!

To do that, **Click on Profile**, and then select under **Act As** select **A Delegate for another Traveler who has granted you this permission**.

The delegate can type in the last name of the traveler they are a delegate for, or they can use the drop-down arrow and will be given a list of Travelers they have been given permissions to delegate for and select from the list. Then **Click Switch**.



The page will change and at the top where profile was you will see **Acting As** and the **Traveler** you are delegating for.

To return to acting as yourself (not as a delegate), or to become the delegate of a different Traveler simply **Click Acting As** and a box will pop up. Select **Myself** or **A Delegate for Traveler who has granted you this permission**.

Then **Click Switch**.

