

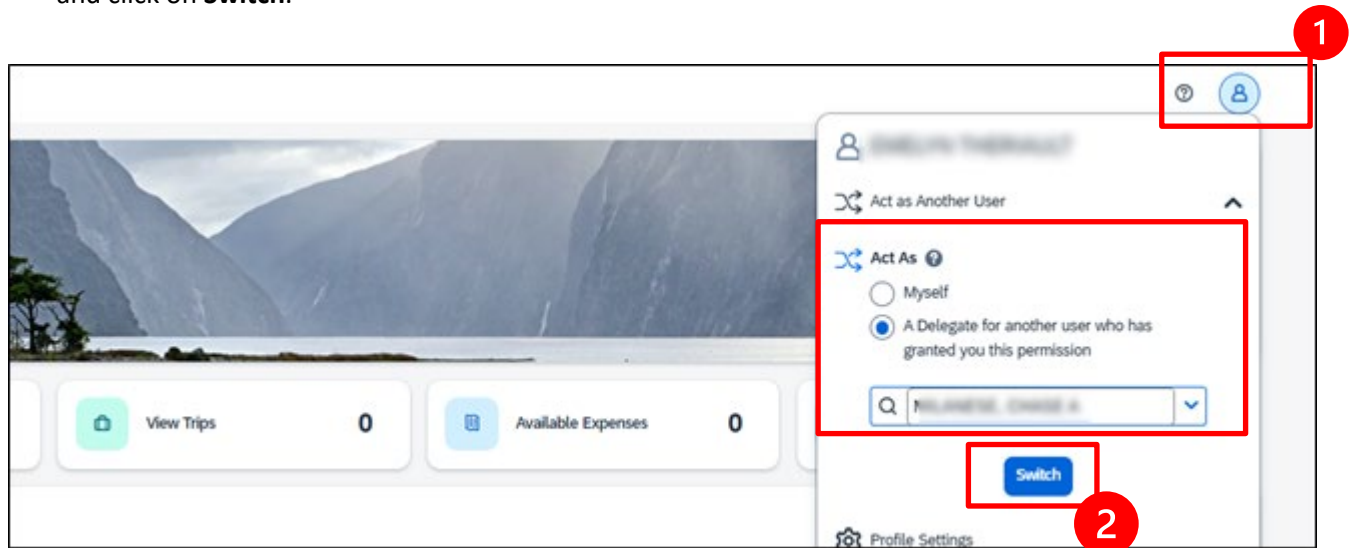
HOW TO ACT AS A DELEGATE (EXPENSE & APPROVAL DELEGATES)

HOW TO ACT AS AN EXPENSE DELEGATE

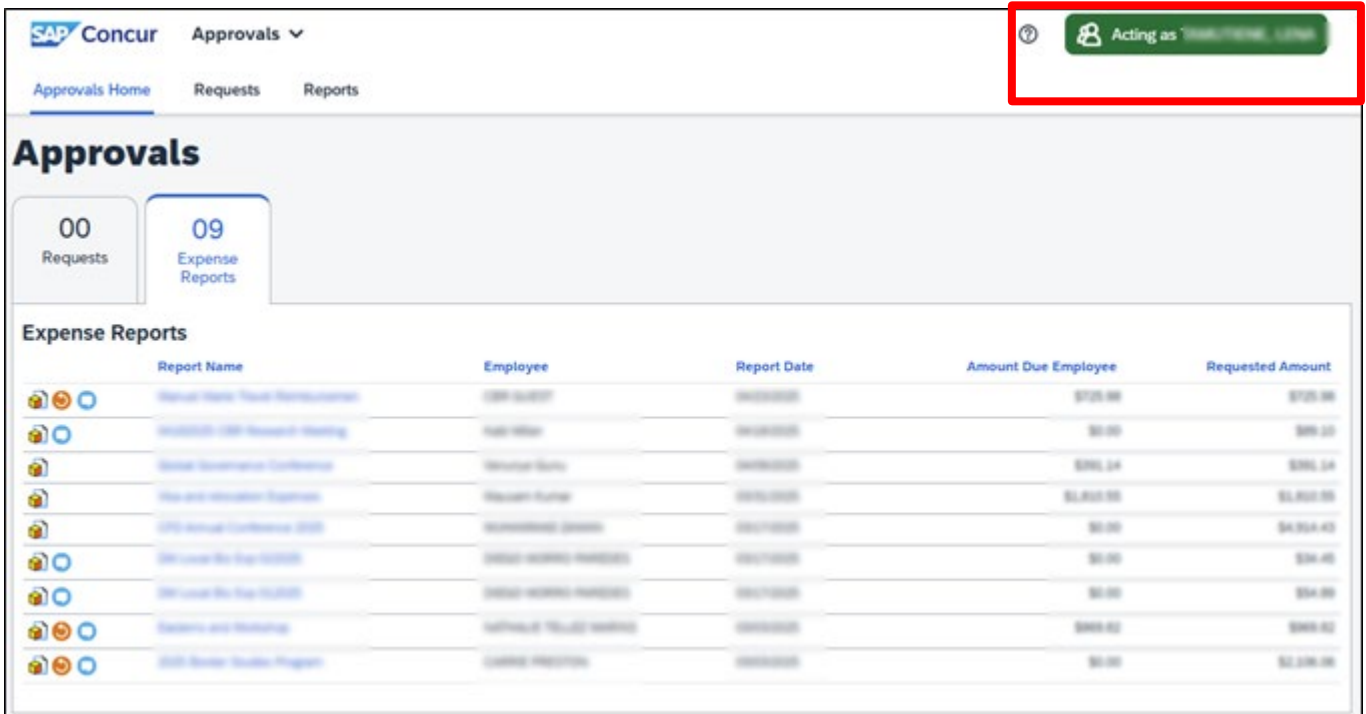
- Expense Delegates can prepare Expense Reports, book travel, submit Expense Reports, view receipts, and receive emails from SAP Concur.
- To complete these actions on behalf of someone else, you must be set up as their Expense Delegate. [Reference: [How to Assign Expense Delegates](#)].

Once you have been set up as an Expense Delegate for another employee, follow the steps below to prepare an Expense Report on their behalf.

1. Click the **Profile** icon in the top right corner of your Concur home page. If you have been assigned as an Expense Delegate or travel arranger for someone, the **Act As** section will appear in the Profile drop-down.
2. Select the radio button next to “**A Delegate for another user who has granted you this permission**” and enter all or part of the other user’s name in the search field. You will only be able to locate names of people who have identified you as their Expense Delegate. Select the appropriate name from the list and click on **Switch**.



- Once you click **Switch**, you will begin acting as that user in the Concur platform. This is indicated by the box stating “**Acting as [NAME]**” in the top right corner of the Concur page.
- Start working on an Expense Report or complete other permitted actions on behalf of that person. For instructions on how to create Expense Reports, please refer to [How to Create a Non-Travel Expense Report](#) or [How to Create a Travel Expense Report](#).



Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Report Name: Travel Reimbursement	John Doe	10/15/2020	\$125.00	\$125.00
Report Name: IBM Research Meeting	John Doe	10/15/2020	\$0.00	\$0.00
Report Name: Global Development Conference	Michael Smith	10/15/2020	\$200.14	\$200.14
Report Name: New and Innovation Program	Michael Smith	10/15/2020	\$1,800.00	\$1,800.00
Report Name: 2020 Annual Conference 2020	Michael Smith	10/15/2020	\$0.00	\$4,504.42
Report Name: SAP Concur Pay 10/15/20	Michael Smith	10/15/2020	\$0.00	\$0.00
Report Name: SAP Concur Pay 10/15/20	Michael Smith	10/15/2020	\$0.00	\$0.00
Report Name: Systems and Workings	Michael Smith	10/15/2020	\$0.00	\$0.00
Report Name: 2020 Student Study Program	Michael Smith	10/15/2020	\$0.00	\$2,100.00

Note: If an Expense Report is prepared in the incorrect employee’s profile, the report cannot be transferred to a different account. It must be deleted and recreated in the correct profile.

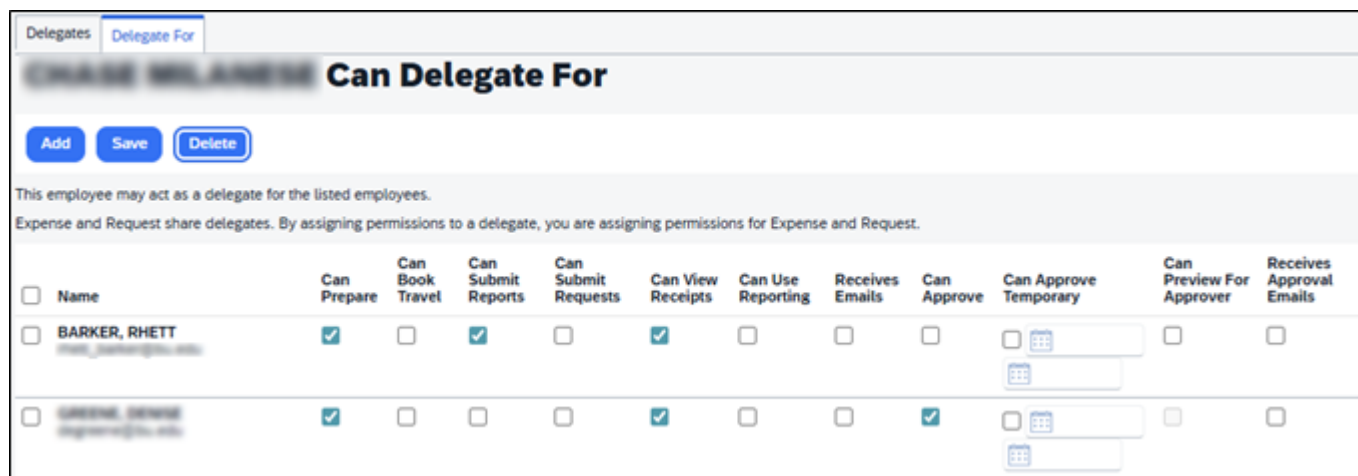
Once submitted in Concur, Expense Reports follow a pre-determined workflow that feeds in from SAP. See page 3 for instructions on completing actions as an Approval Delegate.

HOW TO ACT AS AN APPROVAL DELEGATE

To approve a report on someone's behalf, you must be set up as their Approval Delegate.

Approval Delegates are set up via the same process as Expense Delegates; however, the only boxes necessary to select for Approval Delegates are **Can View Receipts** and **Can Approve**. [Reference: [How to Assign Delegates training guide](#)]

- Select "Receives Approval Emails" if the Approval Delegate would like to be notified when reports are waiting for approval.
- To set up an Approval Delegate for a specific time frame, complete the **Can Approve Temporary** field. This function is useful if the approver would like someone to approve reports awaiting their approval while they are out of the office or on vacation.



Delegates **Delegate For**

CHASE WILANESSE Can Delegate For

Add Save 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.

☐ Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐ BARKER, RHETT rhett_barker@bu.edu	☒	☐	☒	☐	☒	☐	☐	☐	☐ [Calendar Icon]	☐	☐
☐ LARSON, DENISE denise_larson@bu.edu	☒	☐	☐	☐	☒	☐	☐	☒	☐ [Calendar Icon]	☐	☐

For instructions on approving expense reports, please see [How to Approve Non-Travel Expense Reports](#) or [How to Approve Travel Expense Report](#) training guides.

- Note: Approval Delegates will only see the reports currently requiring that employee's approval; they will not see the Expense or Travel tabs when accessing the profile of the individual for whom they are an approval delegate.

HOW TO COMPLETE YOUR SESSION AS A DELEGATE WORKING ON BEHALF OF ANOTHER USER

To return to working as yourself in Concur, click the **Profile** drop-down button, select the radio button next to **Myself**, and click the **Switch** button.

