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

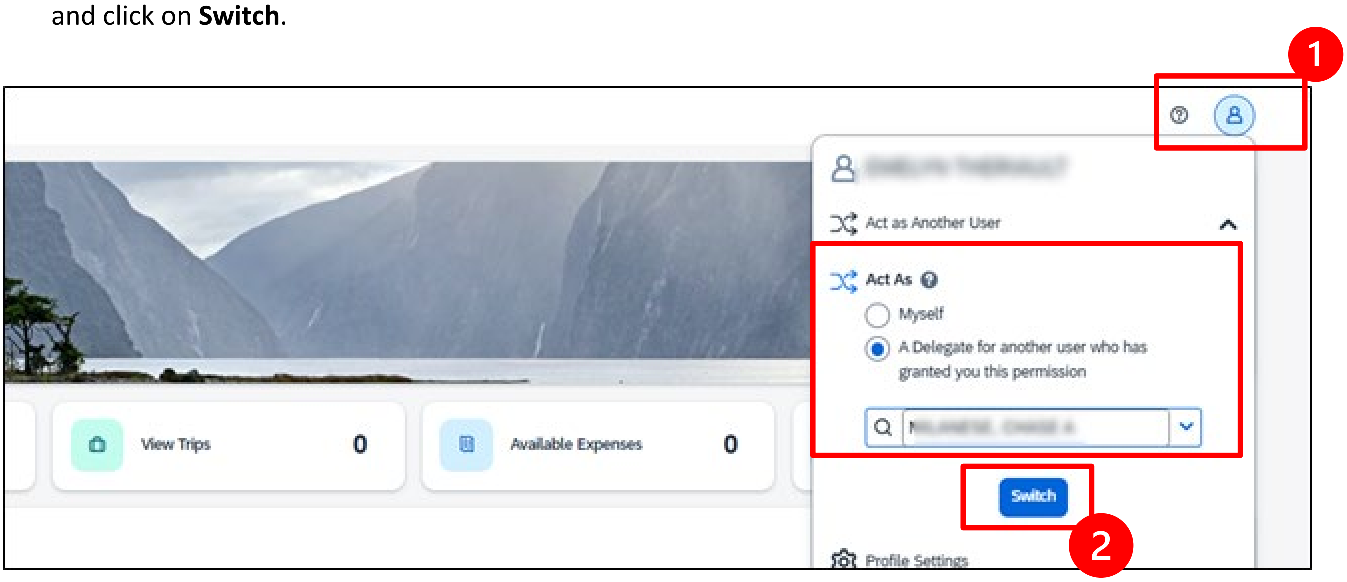
HOW TO ACT AS AN EXPENSE DELEGATE

- 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.

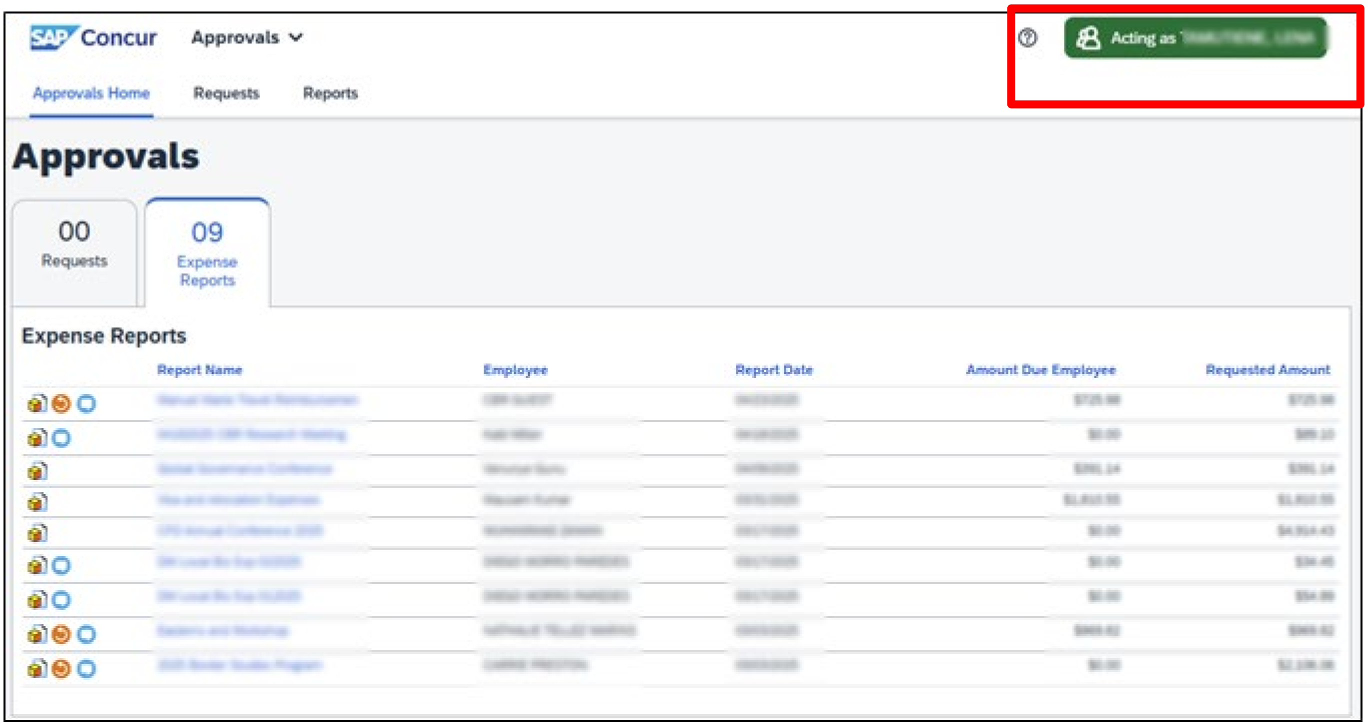
1. Click the **Profile** icon in the top right corner of your Concur home page. If you have been assigned as an Expense Delegate or travel arranger for someone, the **Act As** section will appear in the Profile drop-down.

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**.



3. 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.

4. 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 <u>How to Create a Non-Travel Expense Report</u> or <u>How to Create a Travel Expense Report</u>.



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.

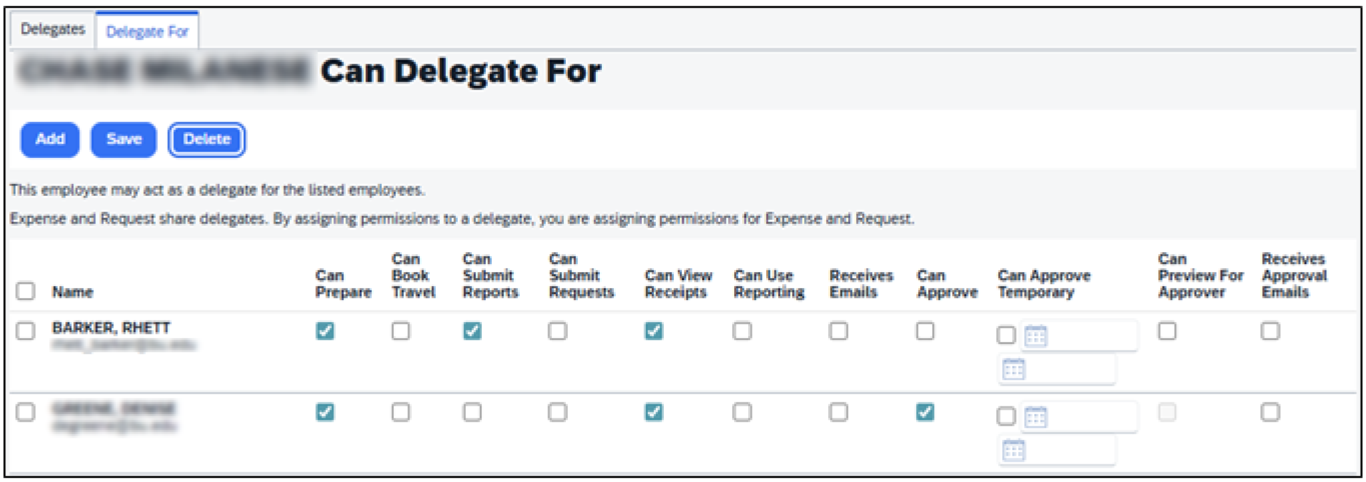
Once submitted in Concur, Expense Reports follow a pre-determined workflow that feeds in from SAP. See page 3 for instructions on completing actions as an Approval Delegate.

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.



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.