

ACTING AS A DELEGATE – EXPENSE AND APPROVAL

This guide demonstrates how Expense Delegates and Approval Delegates access functions to complete tasks on behalf of another user.

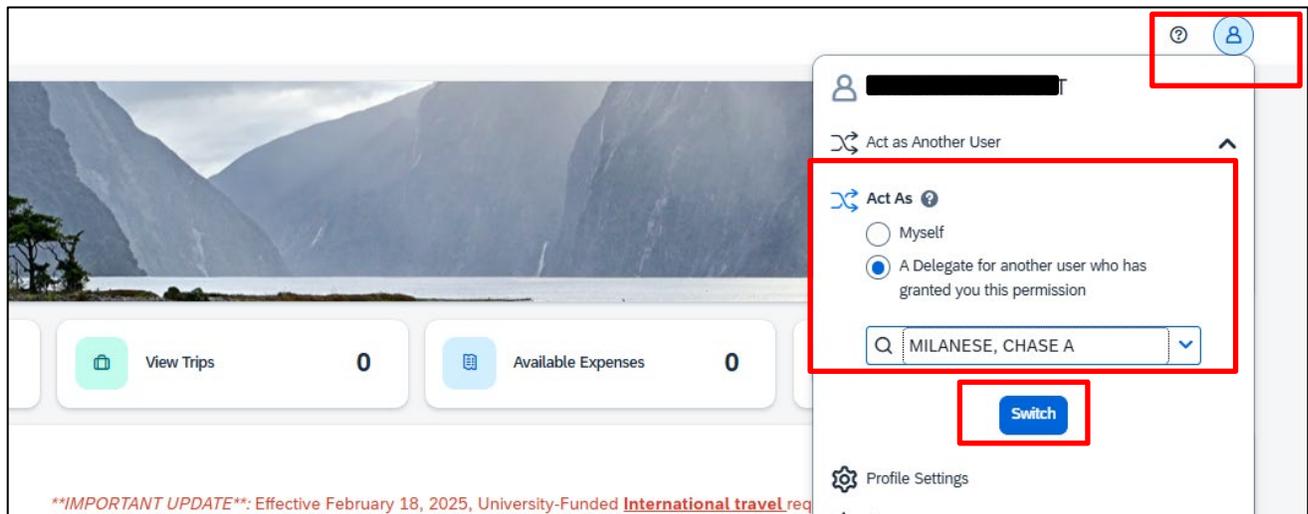
PART ONE: ACTING AS AN EXPENSE DELEGATE

[Expense Delegates](#) can perform the following: prepare Expense Reports, book travel, submit Expense Reports, view receipts, and receive emails from SAP Concur.

Note: Since Expense Reports exist solely in the report owner’s Concur account and cannot be transferred to a different user’s account, you must be assigned as someone’s Expense Delegate in Concur before you can complete actions on their behalf. [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.
2. 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.
3. Select the radio button next to **“A Delegate for another user who has granted you this permission”** and enter all or part of the traveler’s name in the search field. Select the appropriate name from the list and click the **“Switch”** button.



Note: You will only be able to locate and select those individuals who have identified you as their Expense Delegate.

- Once you click “**Switch**,” you will begin acting as that user in the Concur platform, as indicated by the box stating “**Acting as [NAME]**” in the top right corner of the Concur page.

You may now start working on an Expense Report or complete other permitted actions on behalf of that employee. [Reference: [How to Create a Non-Travel Expense Report](#) or [How to Create a Travel Expense Report](#)].

The screenshot shows the SAP Concur interface. At the top right, a green box indicates the user is acting as MILANESE, CHASE A. Below this, the 'Approvals' section shows 00 Requests and 09 Expense Reports. A table of Expense Reports is displayed with columns for Report Name, Employee, Report Date, Amount Due Employee, and Requested Amount.

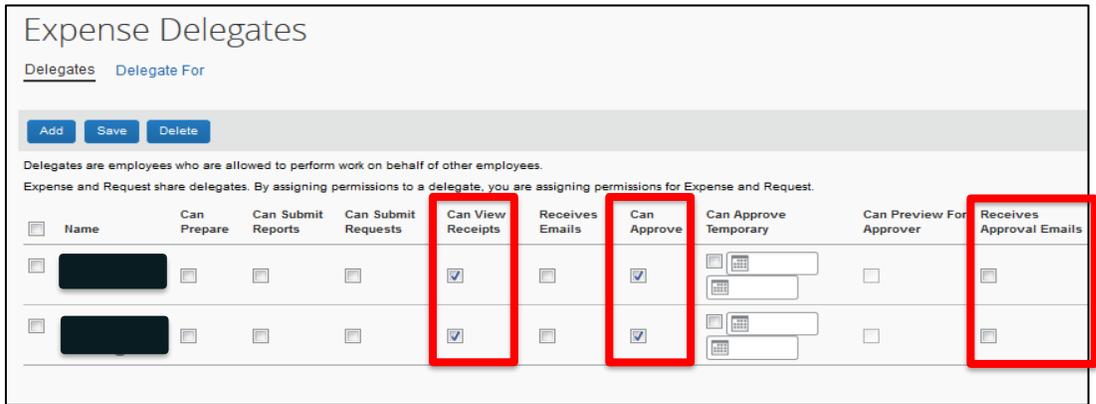
Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Reimbursemen	[REDACTED]	04/23/2025	\$725.98	\$725.98
04182025 CBR Research Meeting	[REDACTED]	04/18/2025	\$0.00	\$89.10
Global Governance Conference	[REDACTED]	04/09/2025	\$391.14	\$391.14
Visa and relocation Expenses	[REDACTED]	03/31/2025	\$1,810.55	\$1,810.55
CFD Annual Conference 2025	[REDACTED]	03/17/2025	\$0.00	\$4,914.43
DM Local Biz Exp 022025	[REDACTED]	03/17/2025	\$0.00	\$34.45
DM Local Biz Exp 012025	[REDACTED]	03/17/2025	\$0.00	\$54.89
Easterns and Workshop	[REDACTED]	03/03/2025	\$969.82	\$969.82
2025 Border Studies Program	[REDACTED]	03/03/2025	\$0.00	\$2,106.06

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.

PART TWO: APPROVAL DELEGATES

Once submitted in Concur, Expense Reports follow a pre-determined workflow that feeds in from SAP. 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.”**
- Select **“Receives Approval Emails”** if the Approval Delegate would like to be notified when reports are waiting for approval.



- Approval Delegates can also be set up for a specific time frame using the **“Can Approve Temporary”** function. 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.

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.

[Reference: [How to Approve Non-Travel Expense Reports](#) or [How to Approve Travel Expense Reports](#)]

FINISHED ACTING ON BEHALF OF ANOTHER USER

1. 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.

