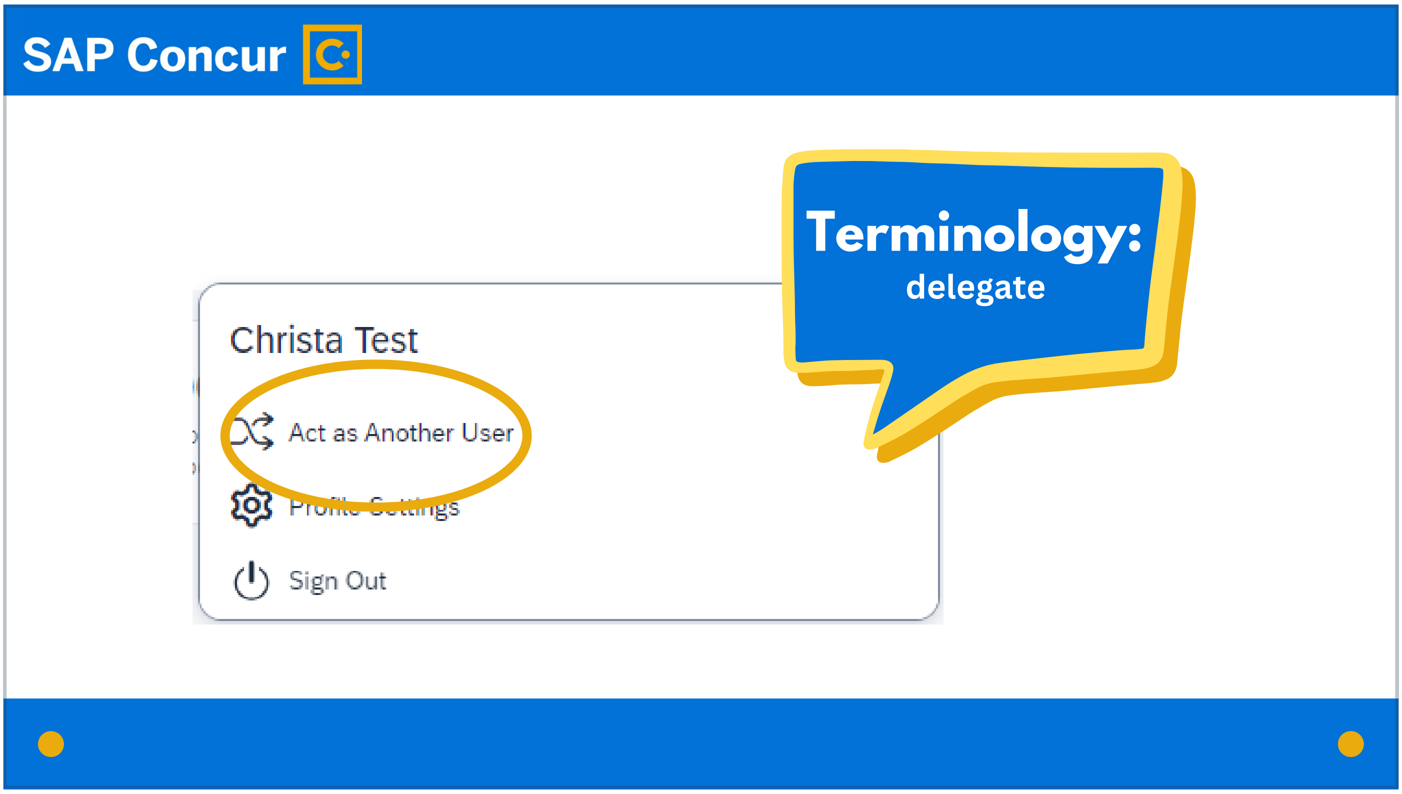
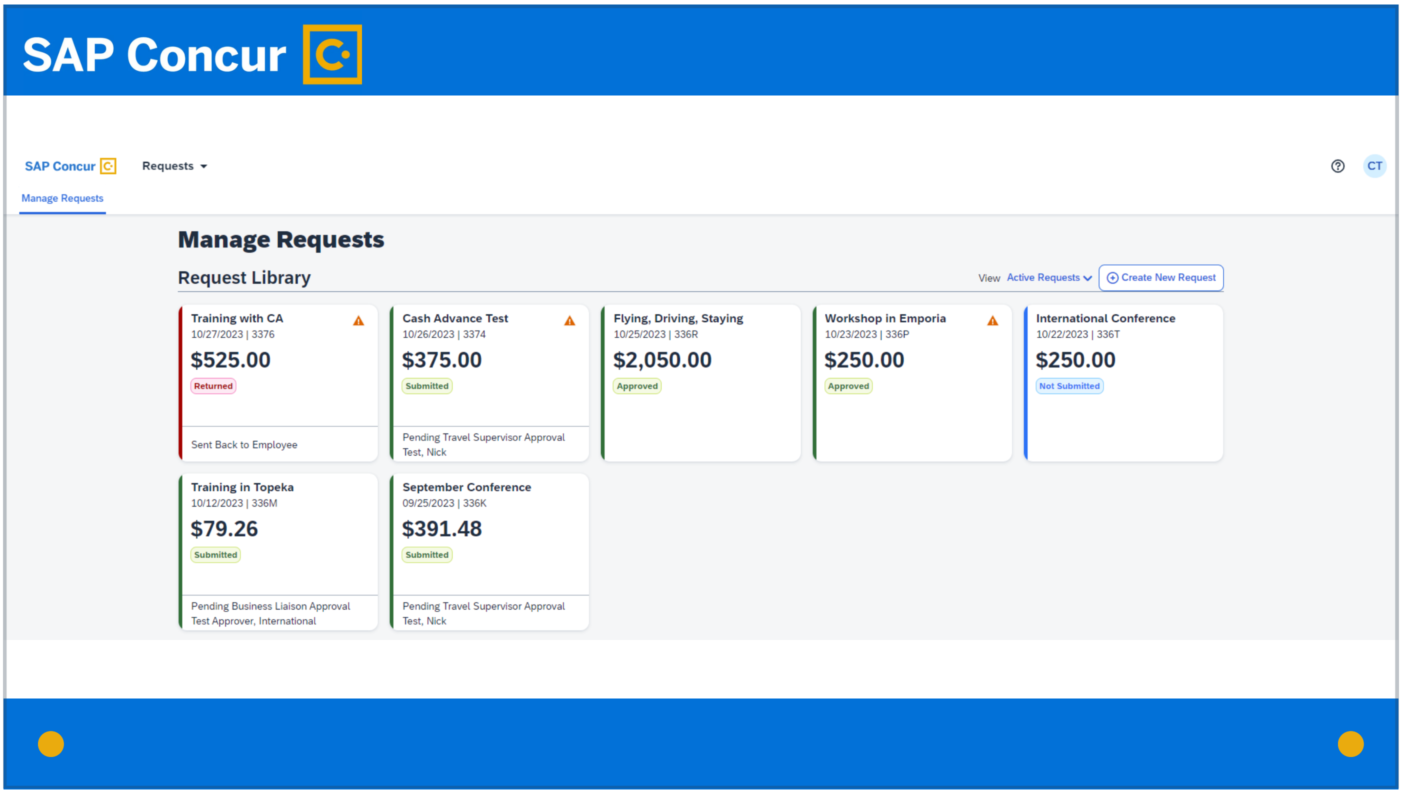
SAP Concur

Getting Started with Concur:

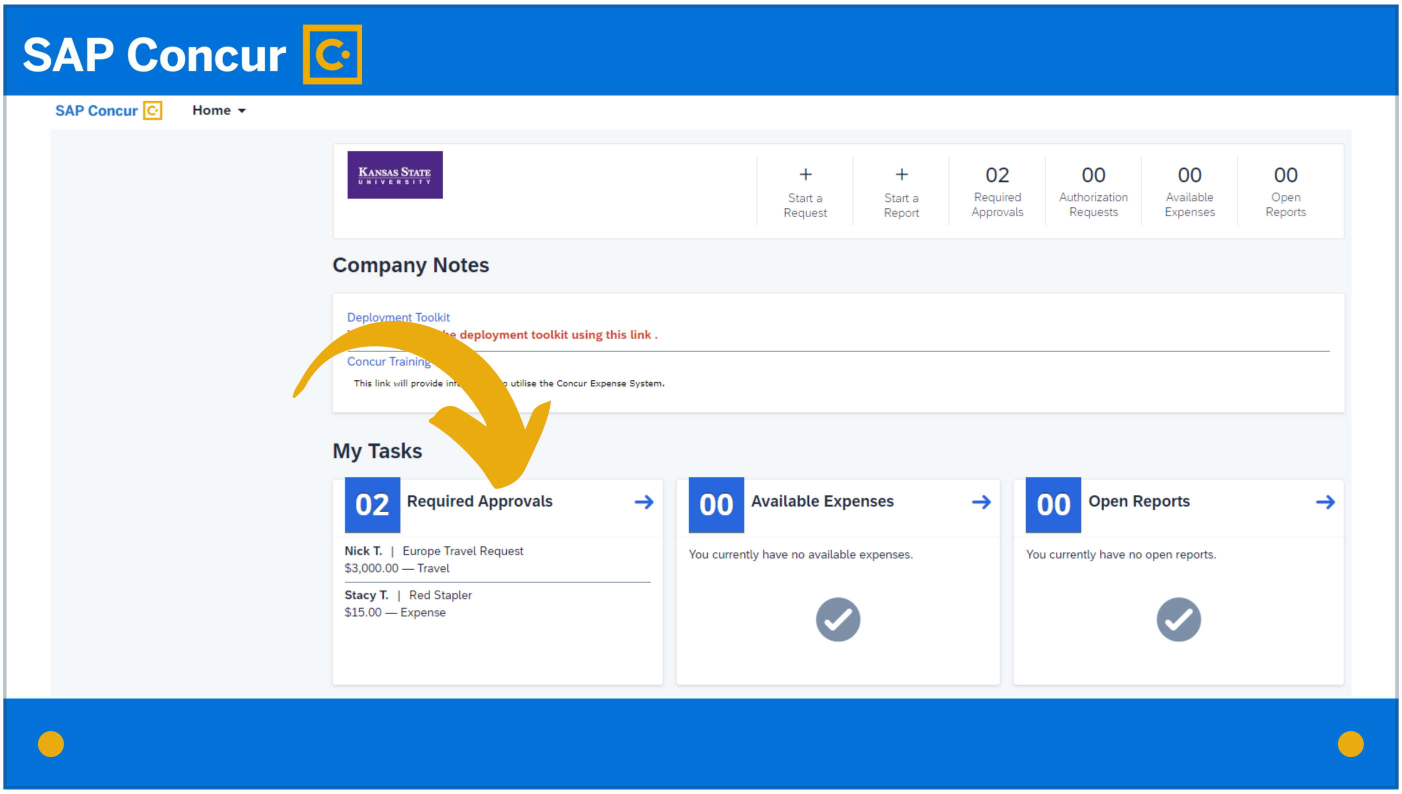
Delegates



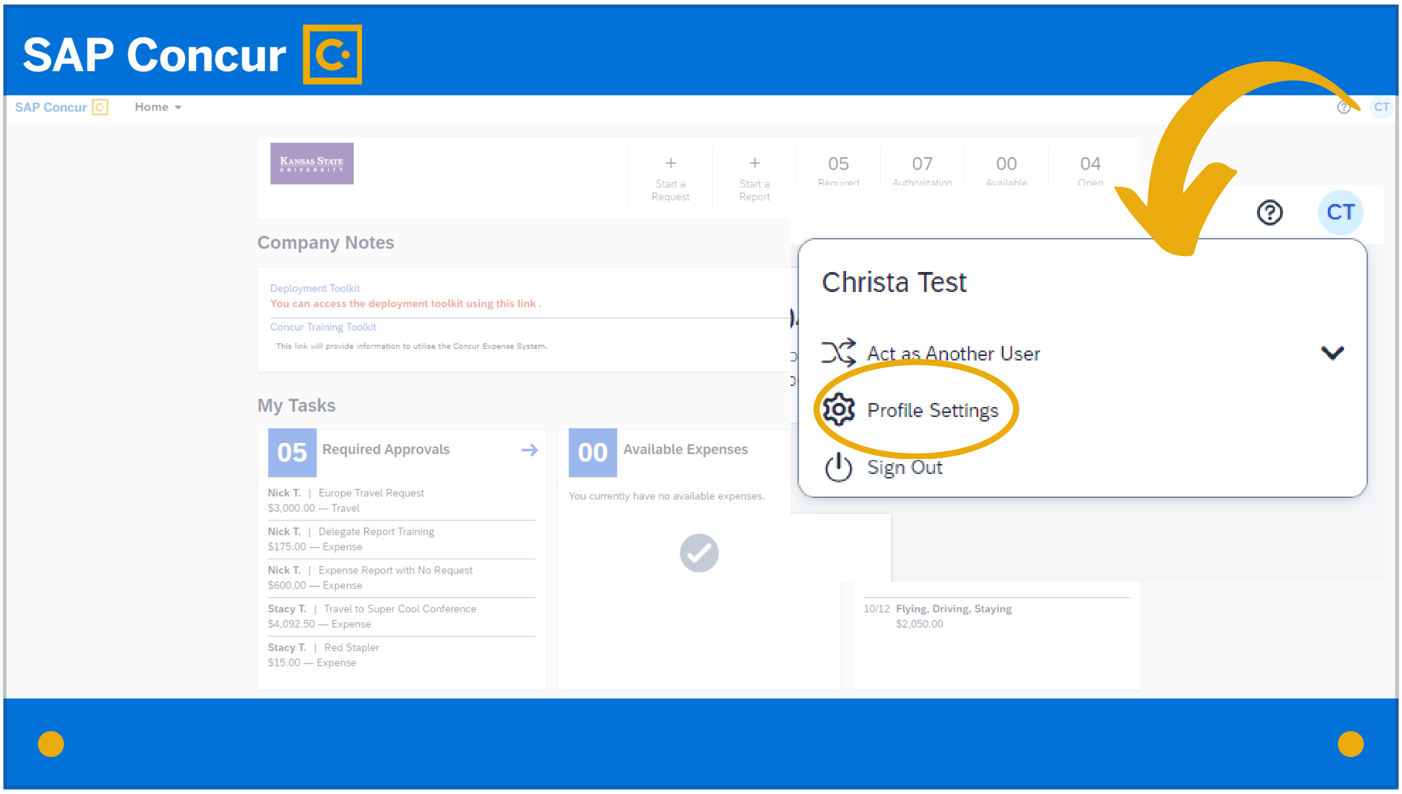
Concur uses the term delegate to refer to a person who has permission to act as another user within the Concur system.



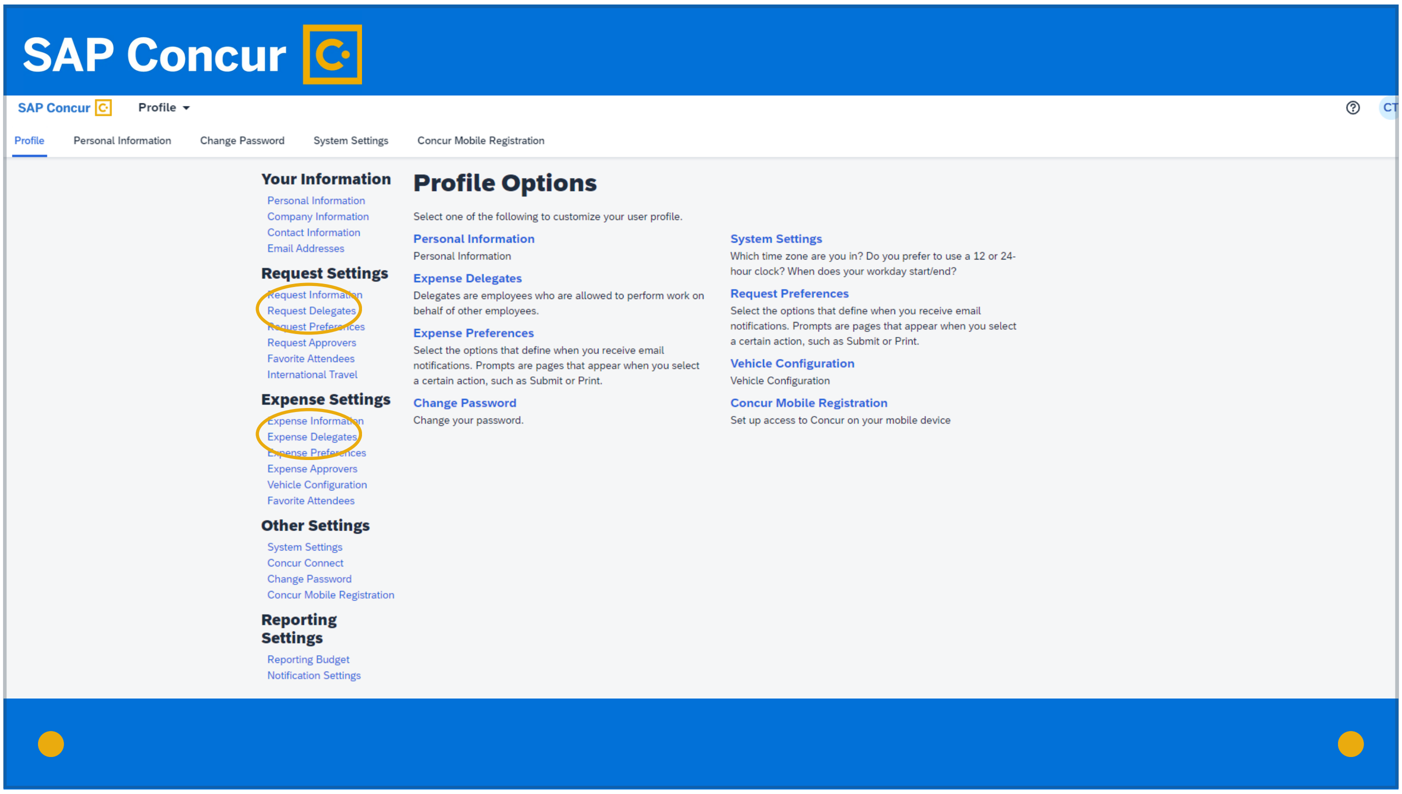
This can be a person who has permission to create requests or reports on behalf of a user



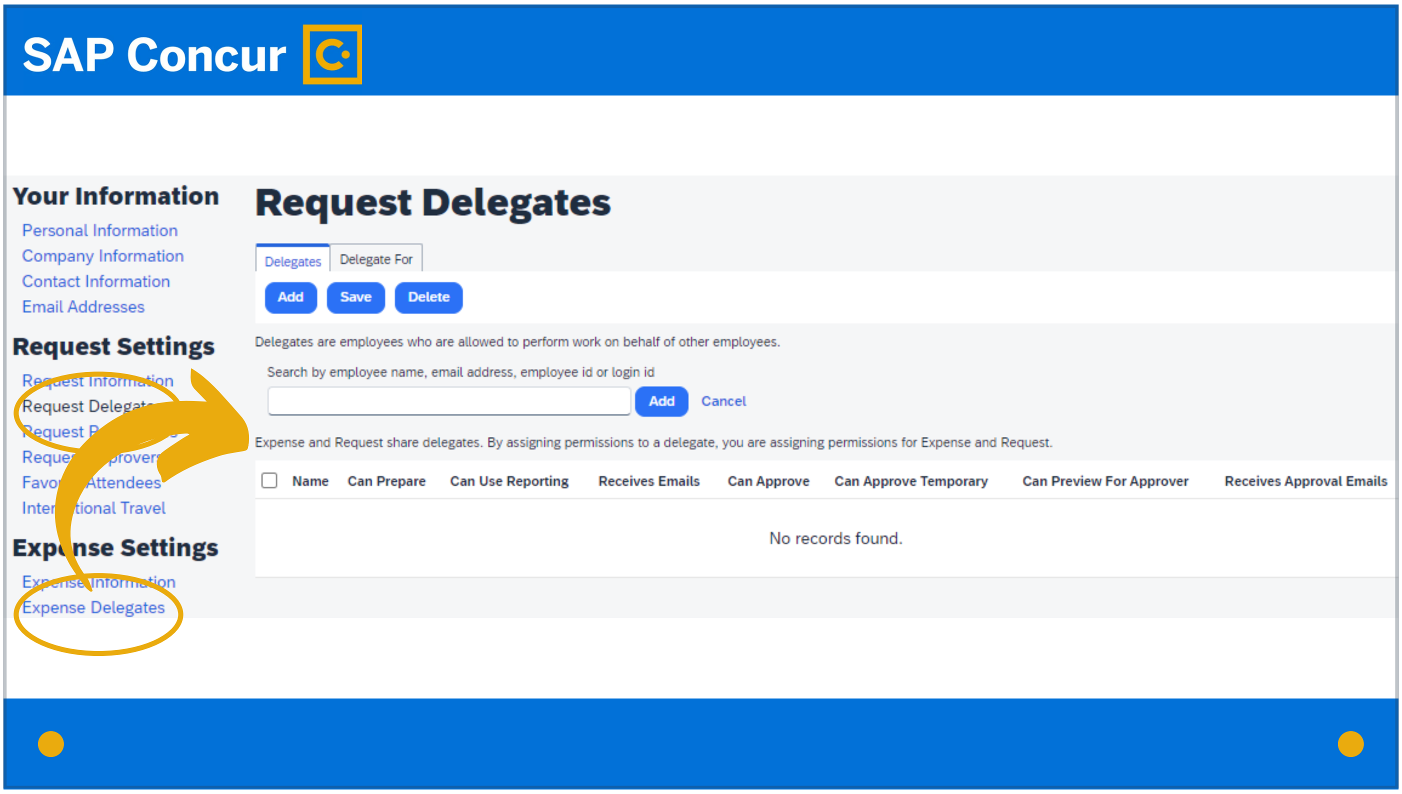
or a person who has permission to review and approve requests or reports on behalf of an approver.



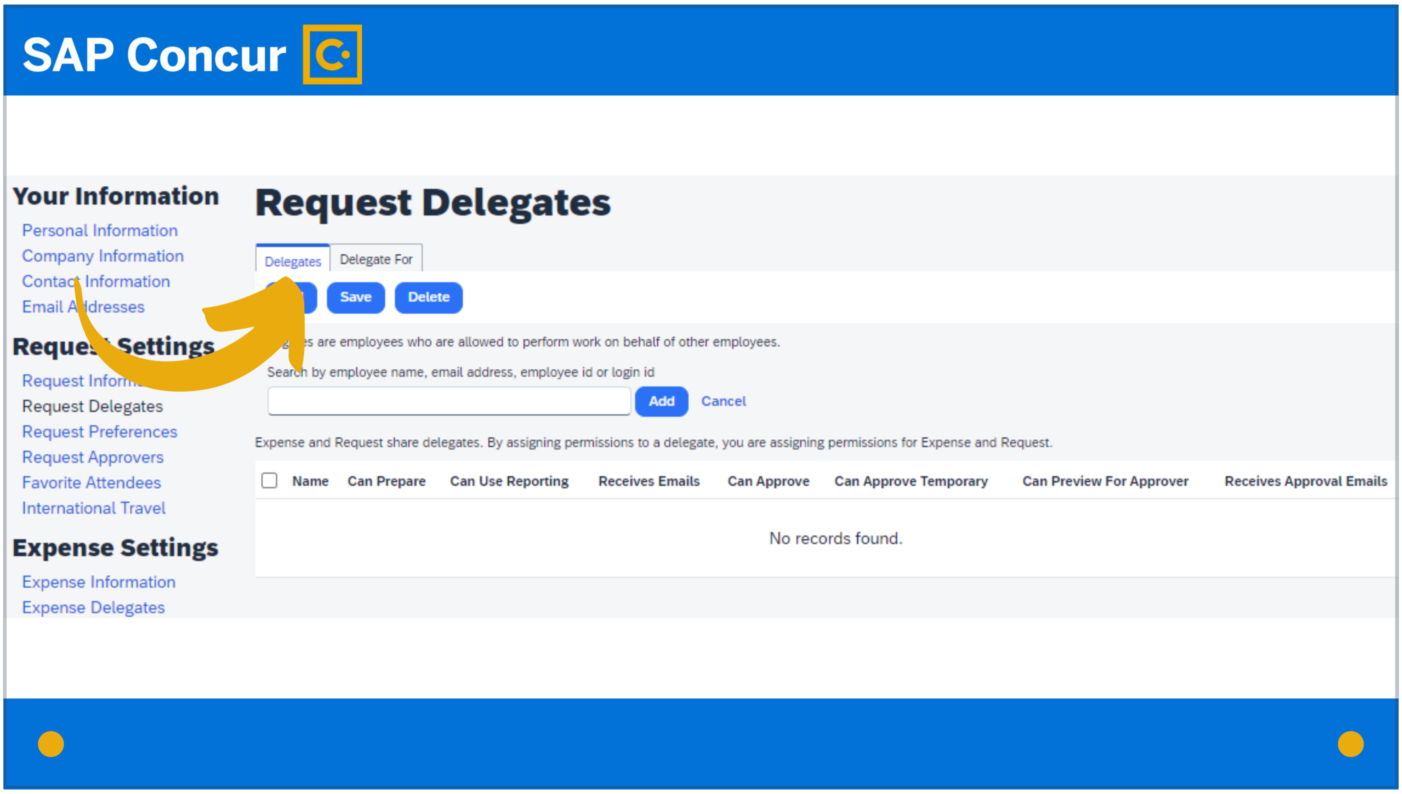
The delegate information for each Concur user can be found by clicking on the profile icon in the top right corner of any Concur screen and going to Profile Settings.



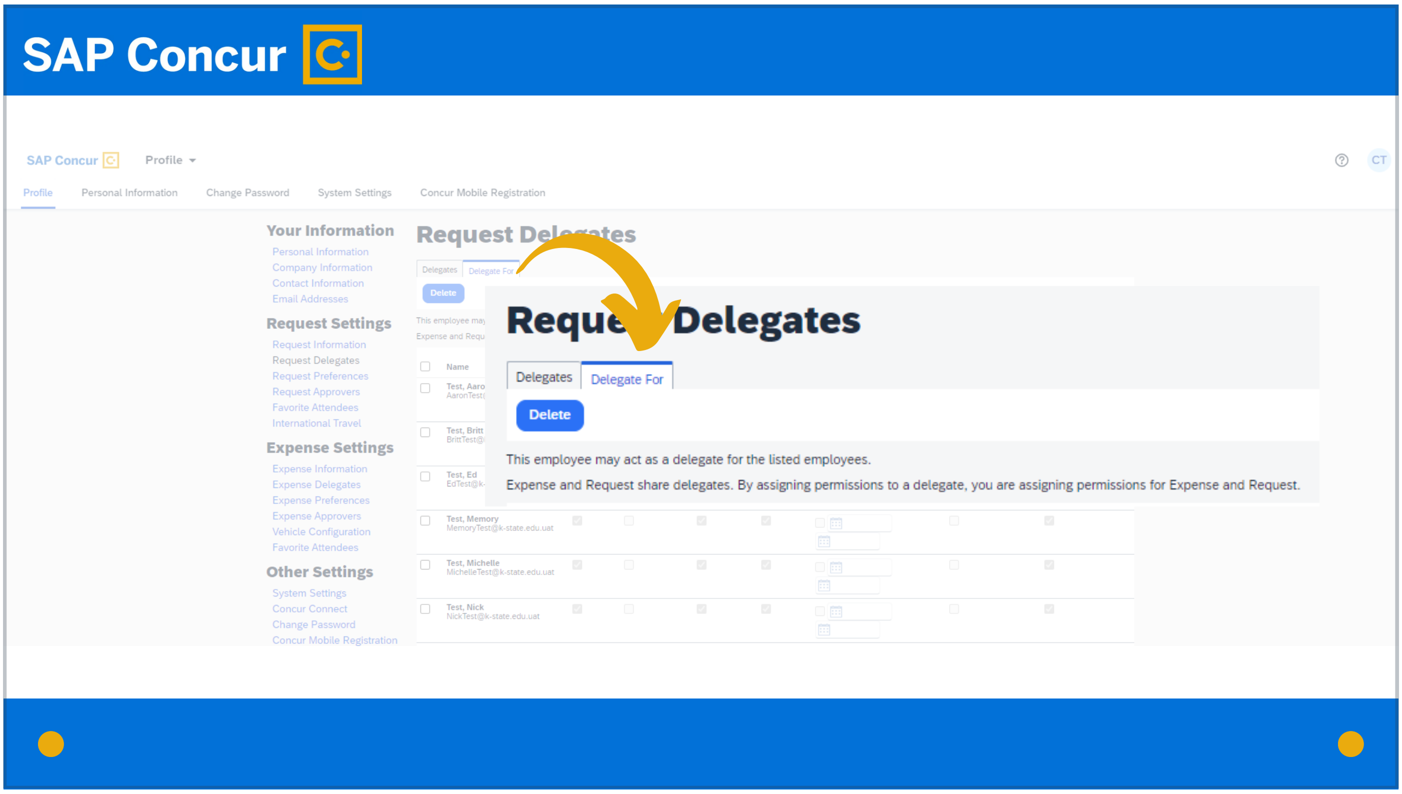
This opens the Profile Options screen, where you can access the delegate information from the left menu either under Request Delegates or Expense Delegates.



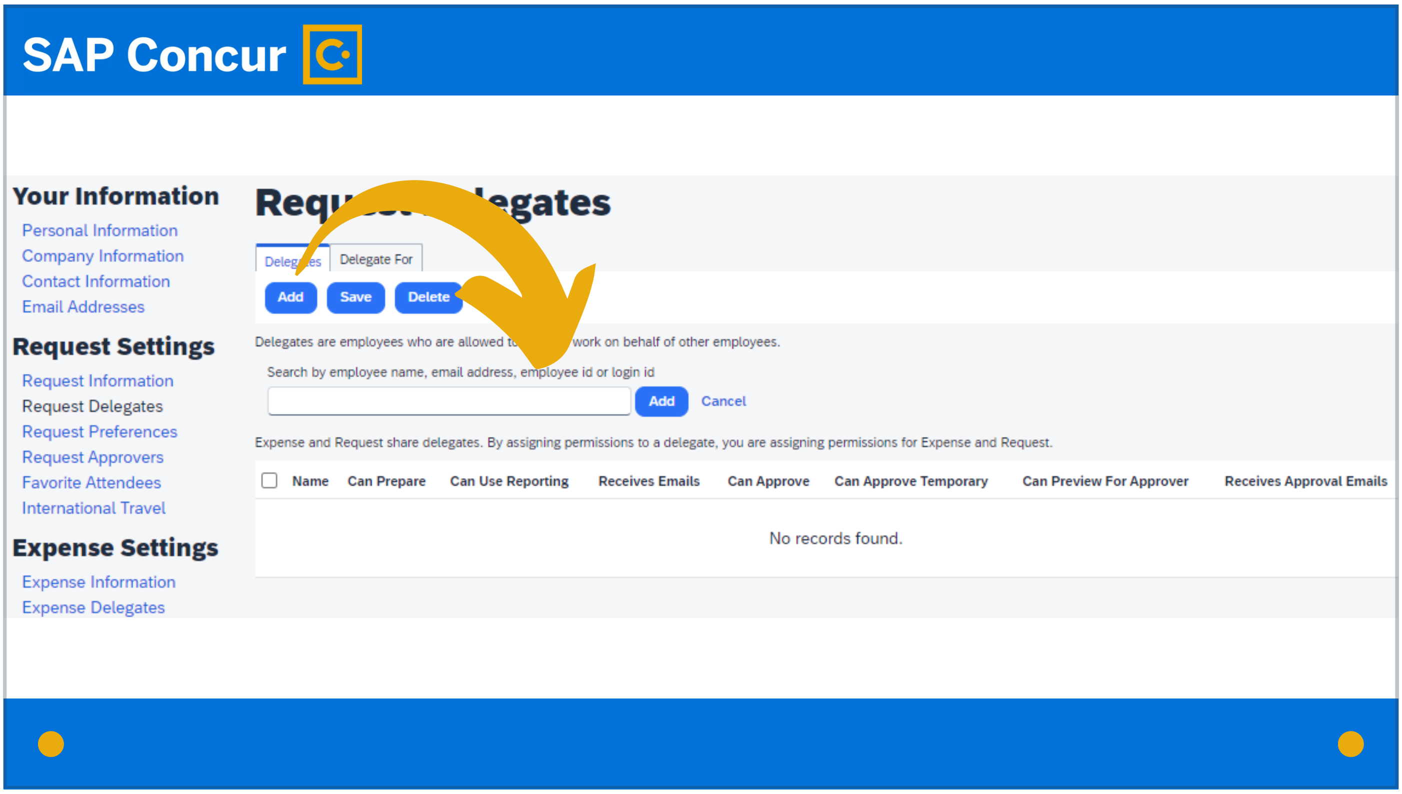
Although there are individual links to delegates for requests and delegates for expenses, the request and expense delegates are not unique; assigning a delegate to requests assigns it to expenses as well and vice versa.



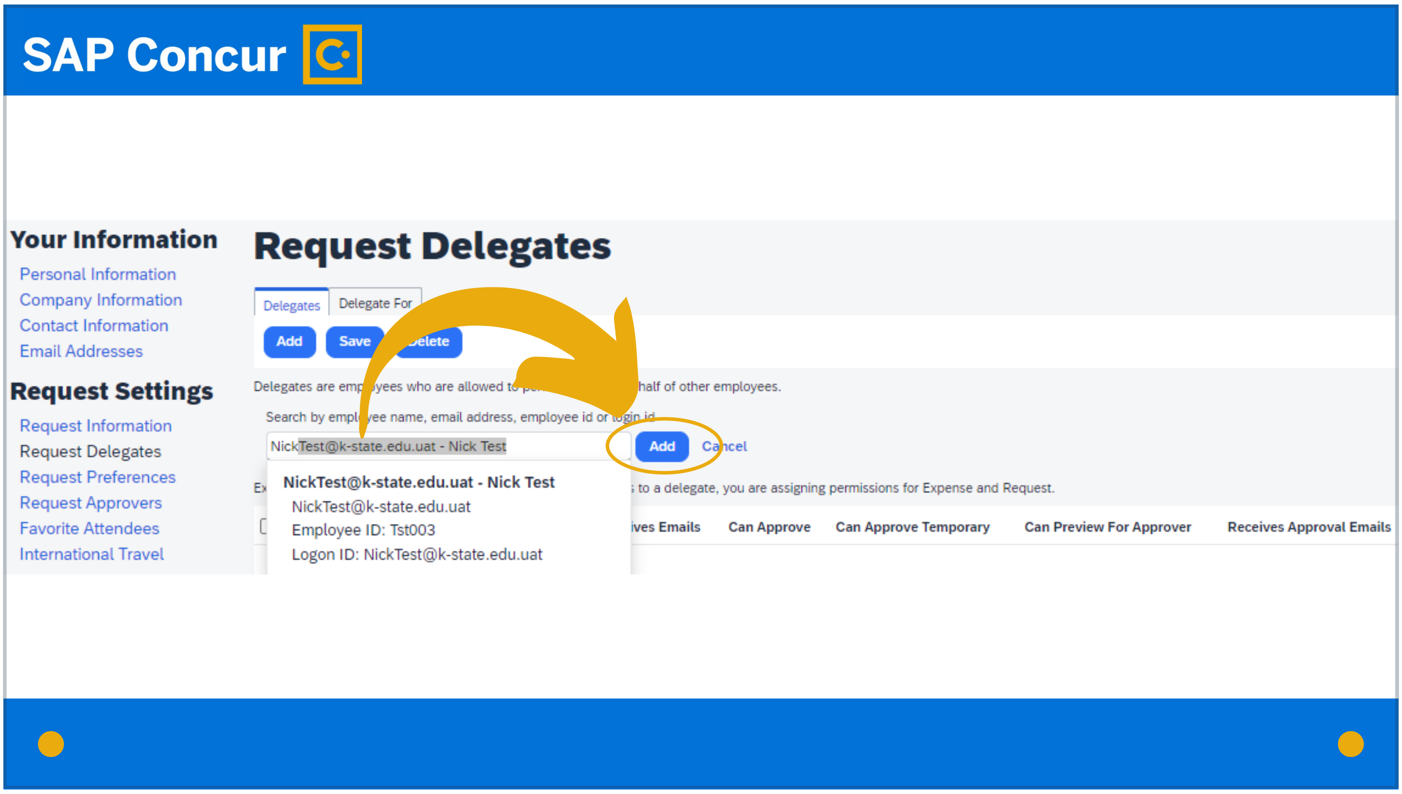
You can see the delegates assigned to the user



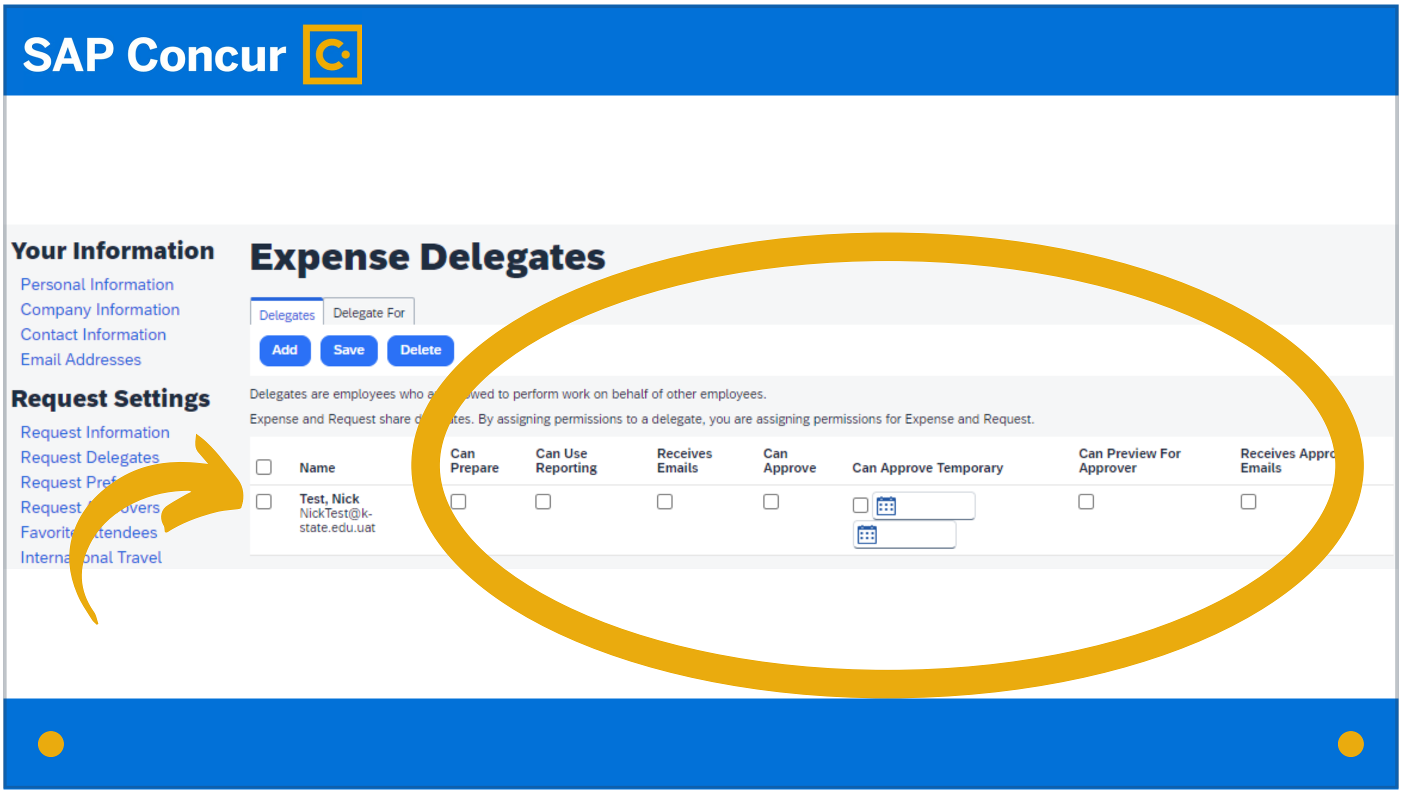
and the people the user is a delegate for.



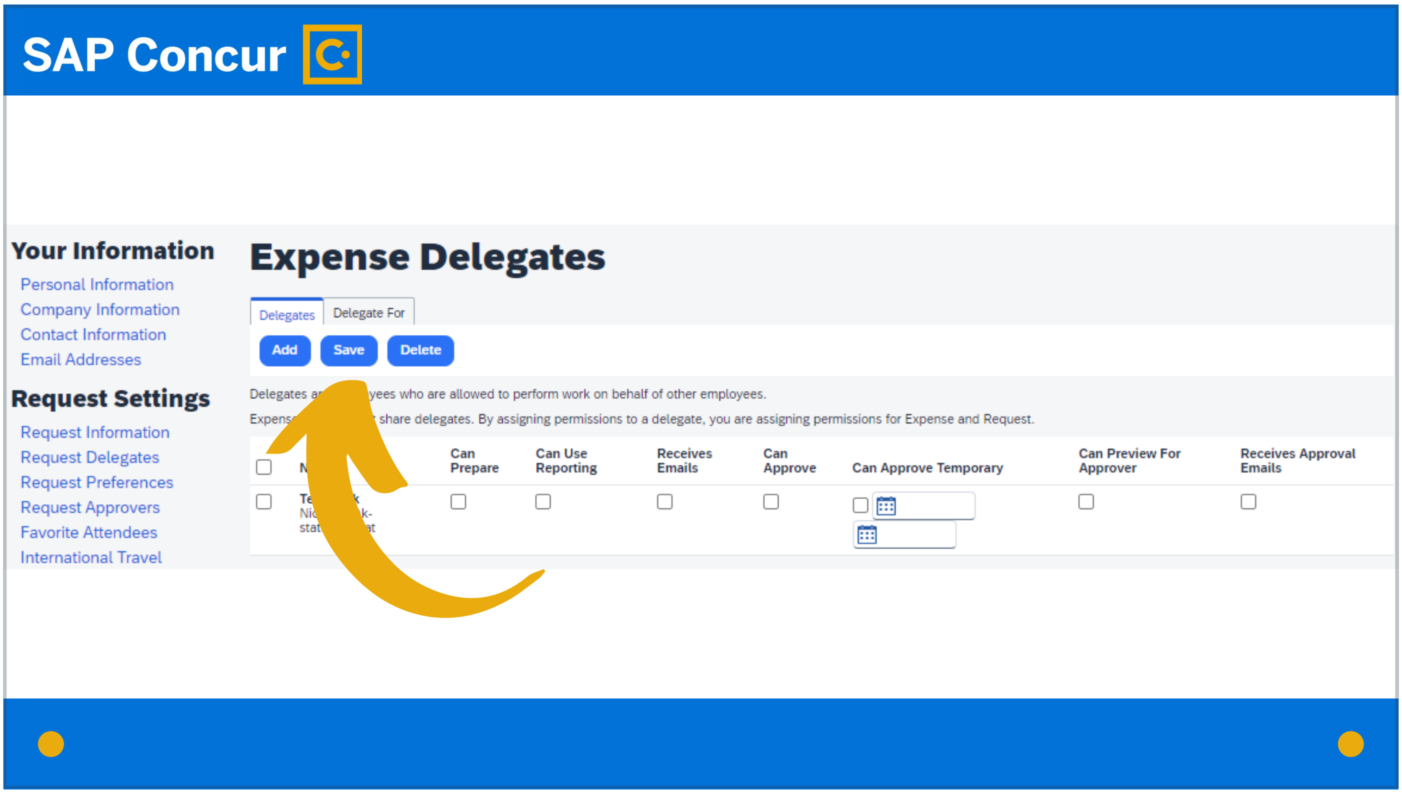
To add a delegate, click the Add button. A search field will appear.



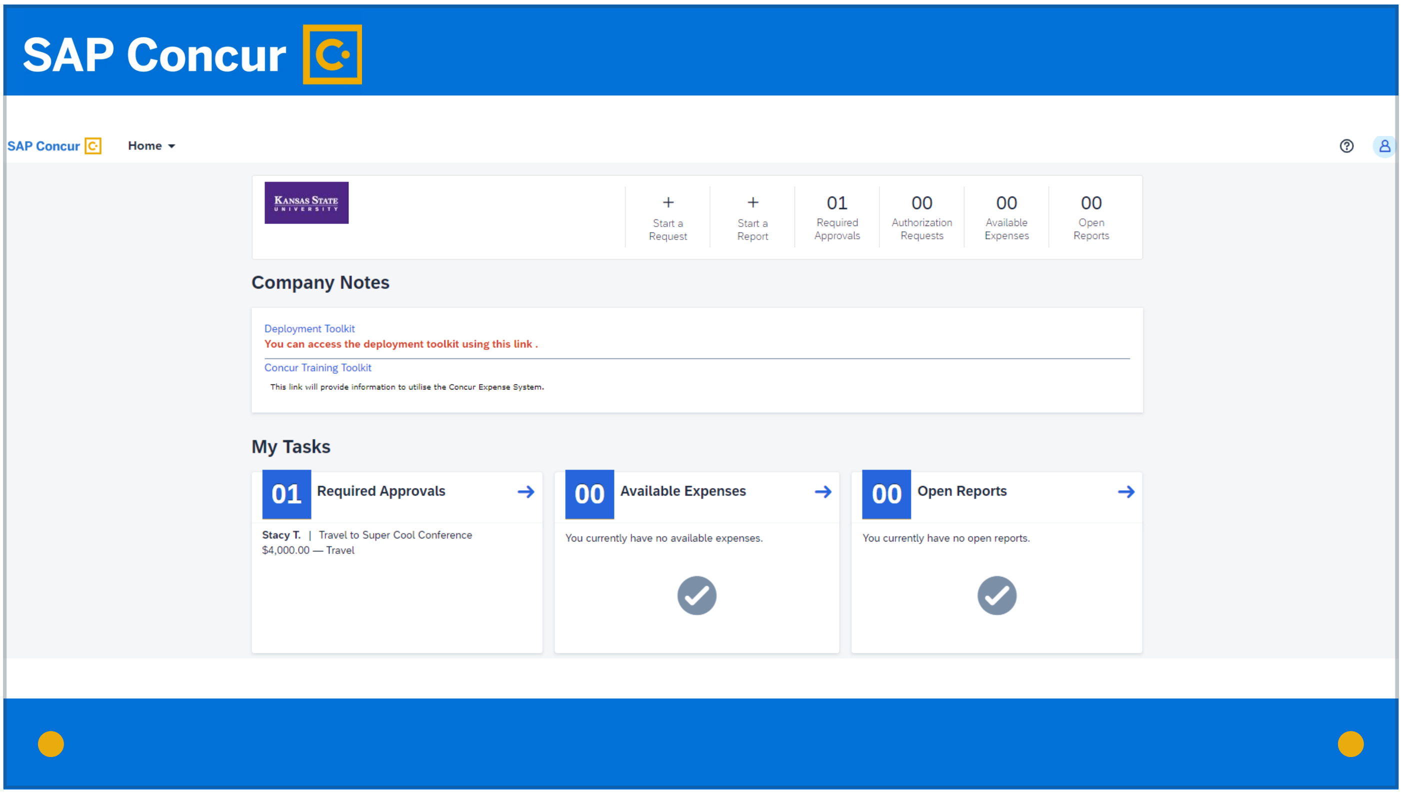
You can search by a person’s name, email address, employee ID, or logon ID. Once you find that person, click the Add button.



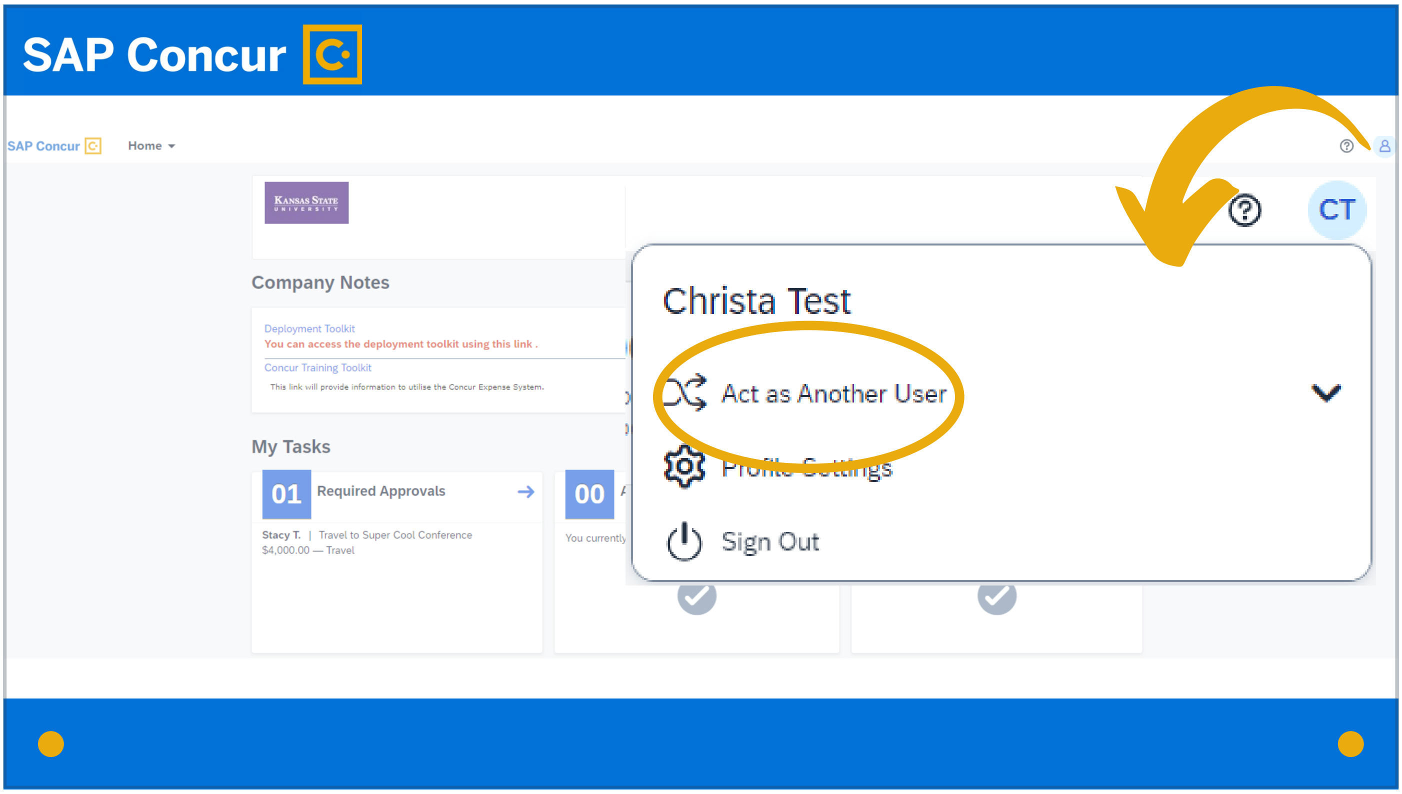
To assign permissions to that delegate, check the box to the left of their name and then check the boxes of the desired permissions.



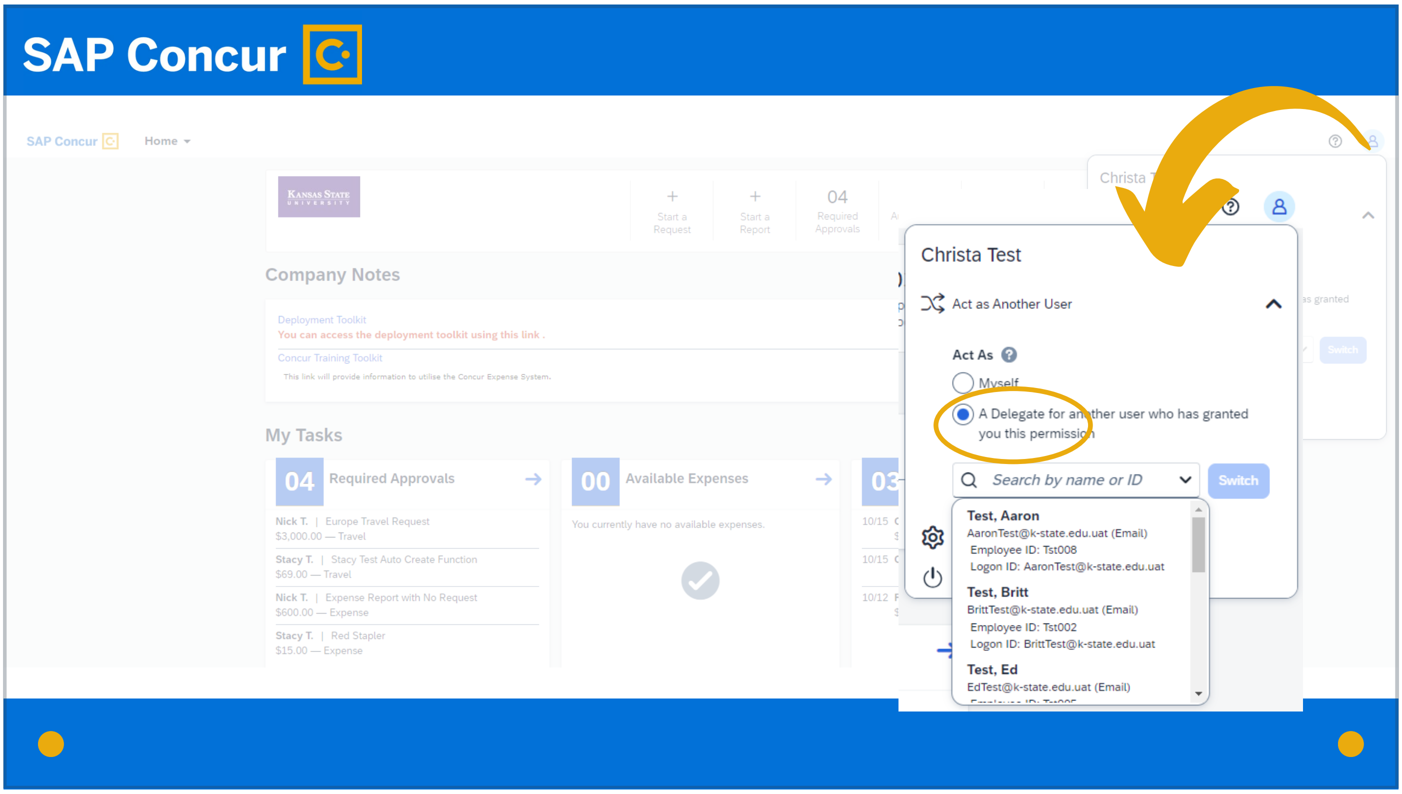
When finished, click Save.



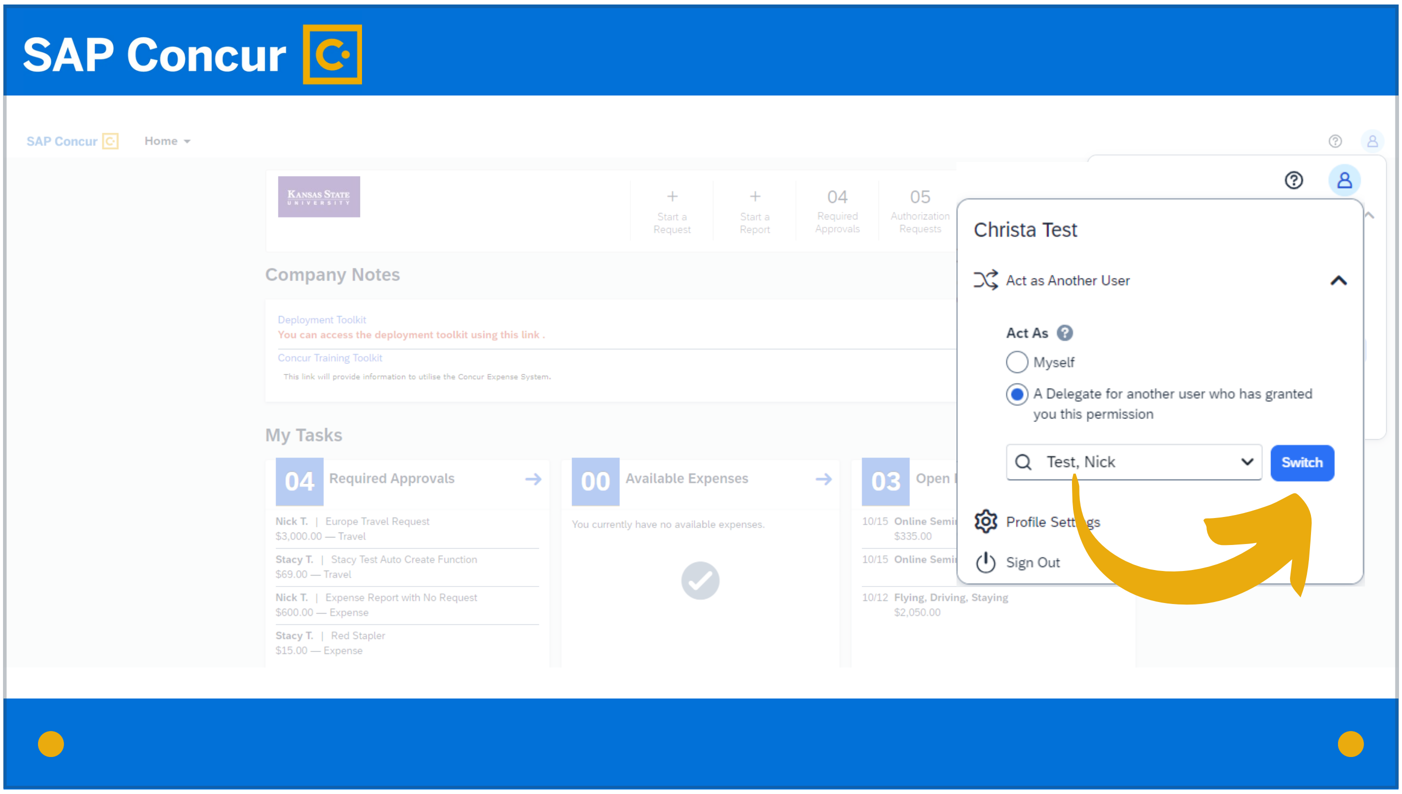
If you are the delegate assigned to another user, to act as that user you will first log in to Concur as yourself.



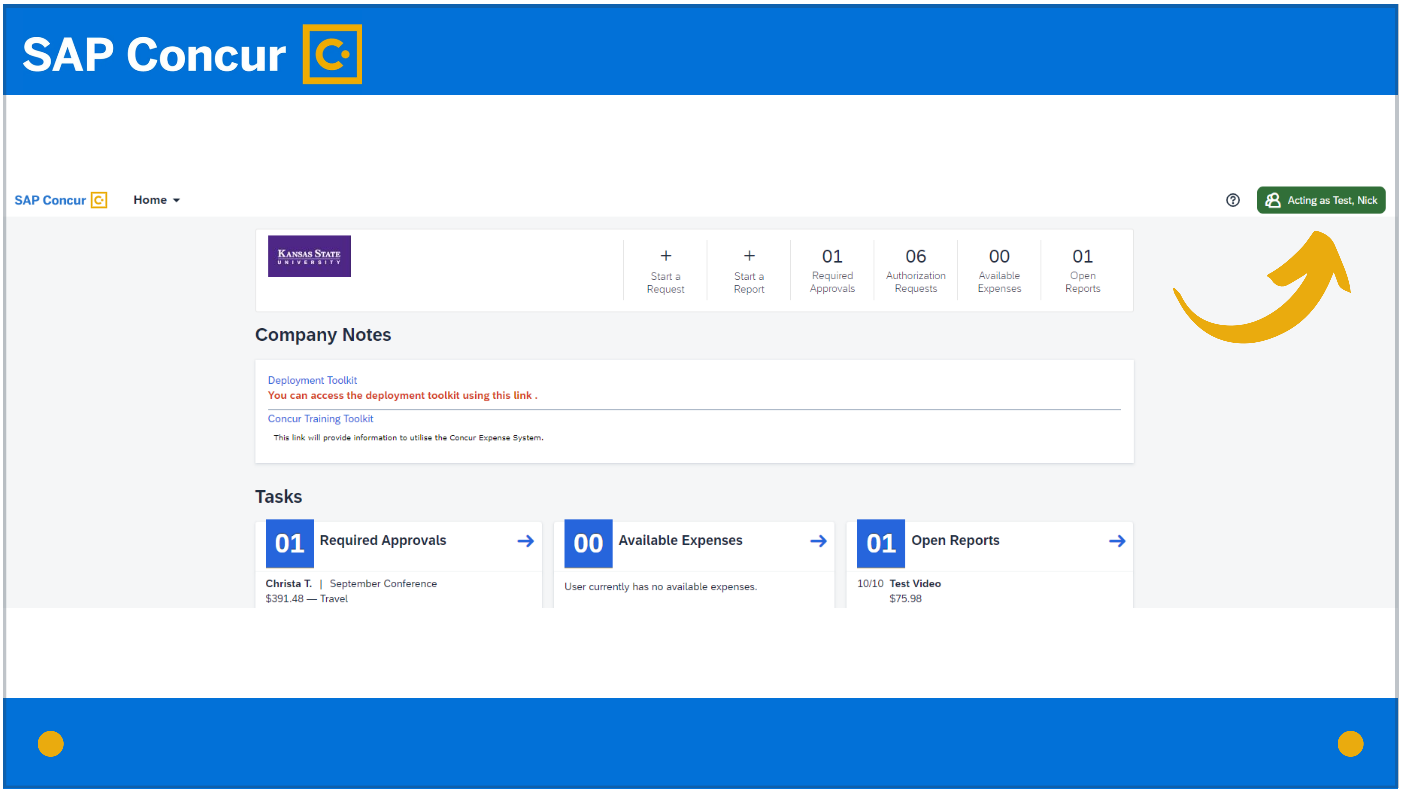
Then, from your profile icon in the top right corner of the screen, you will select Act as Another User.



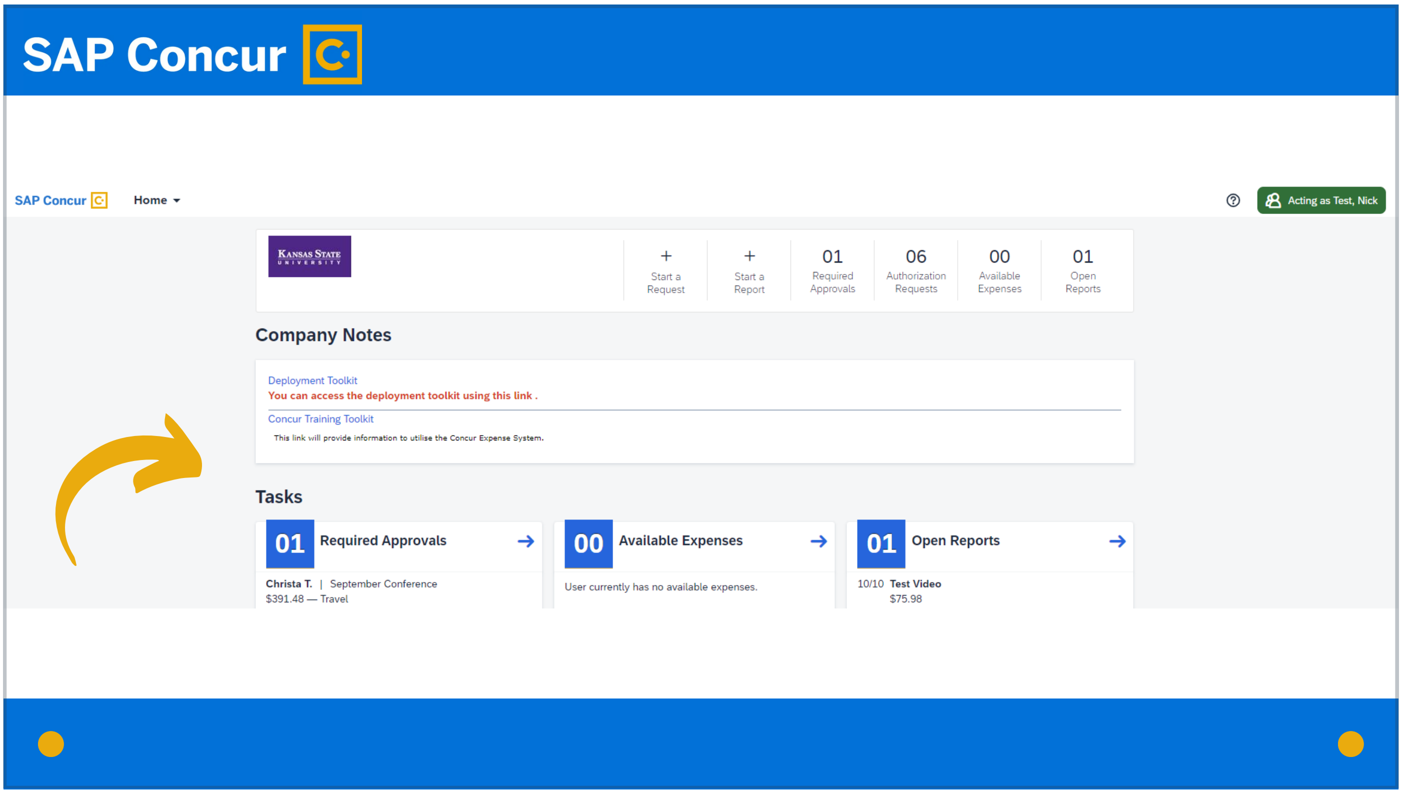
Select the delegate option and search for the appropriate person.



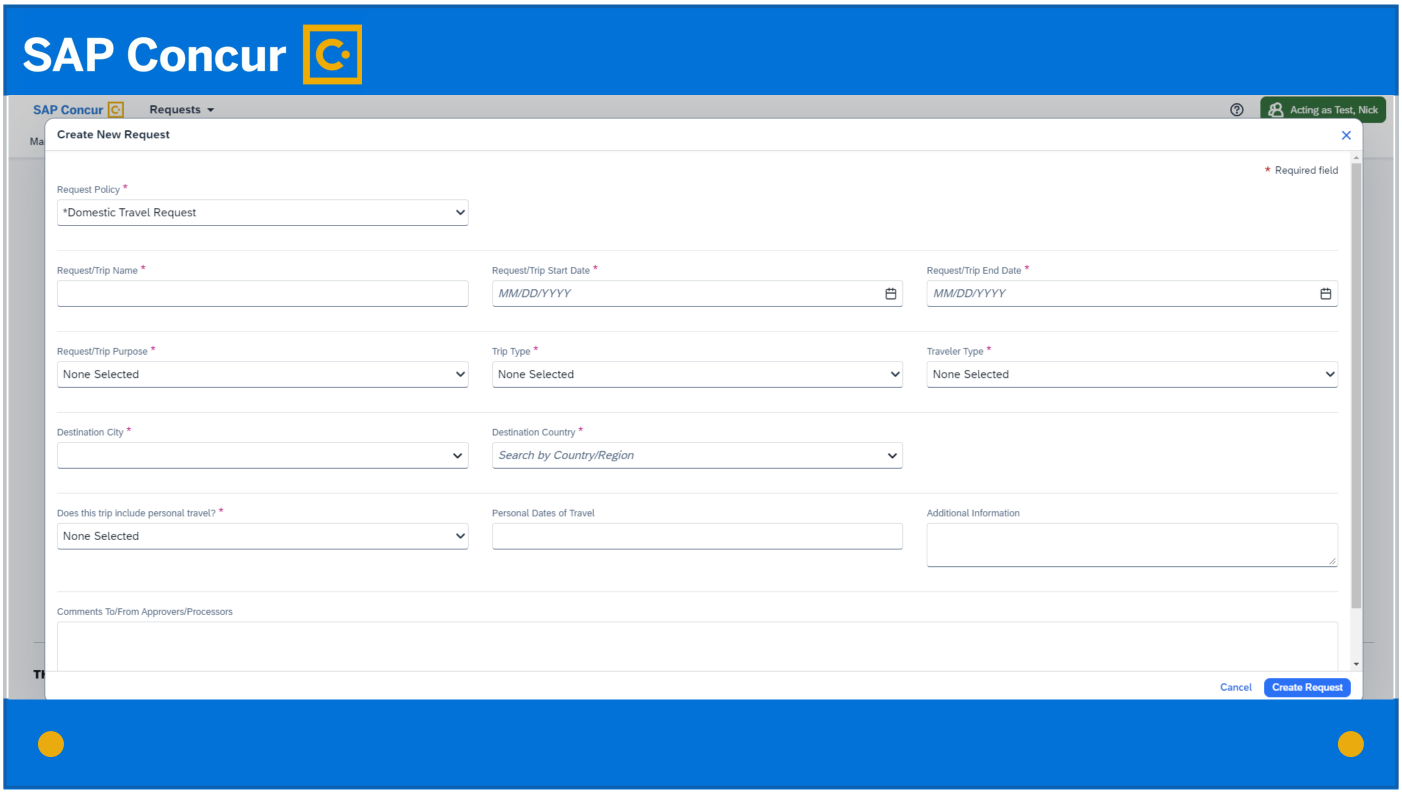
Once you have selected that person, click the Switch button to switch to that person’s profile.



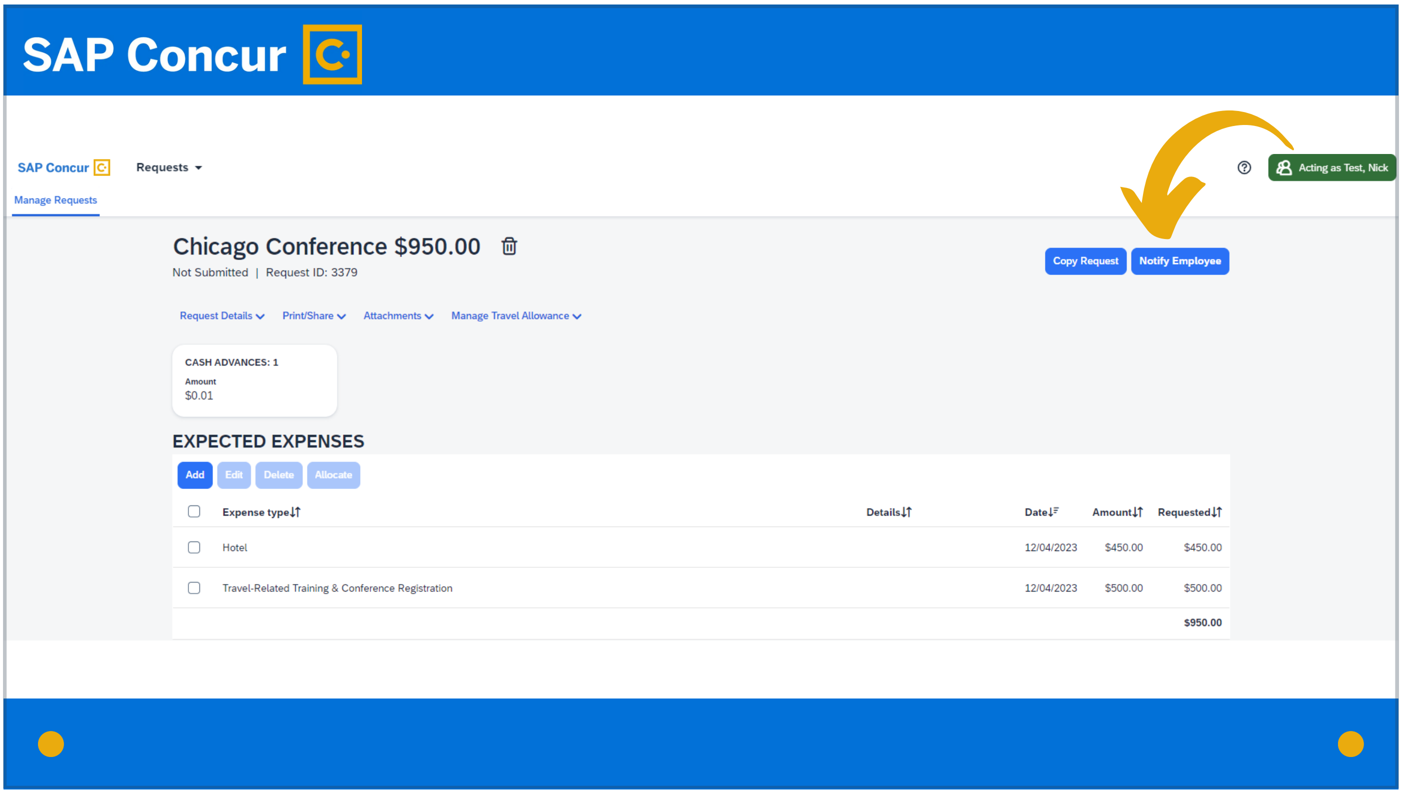
The profile icon in the top right corner will change to a green button that tells you that you are acting as another user.



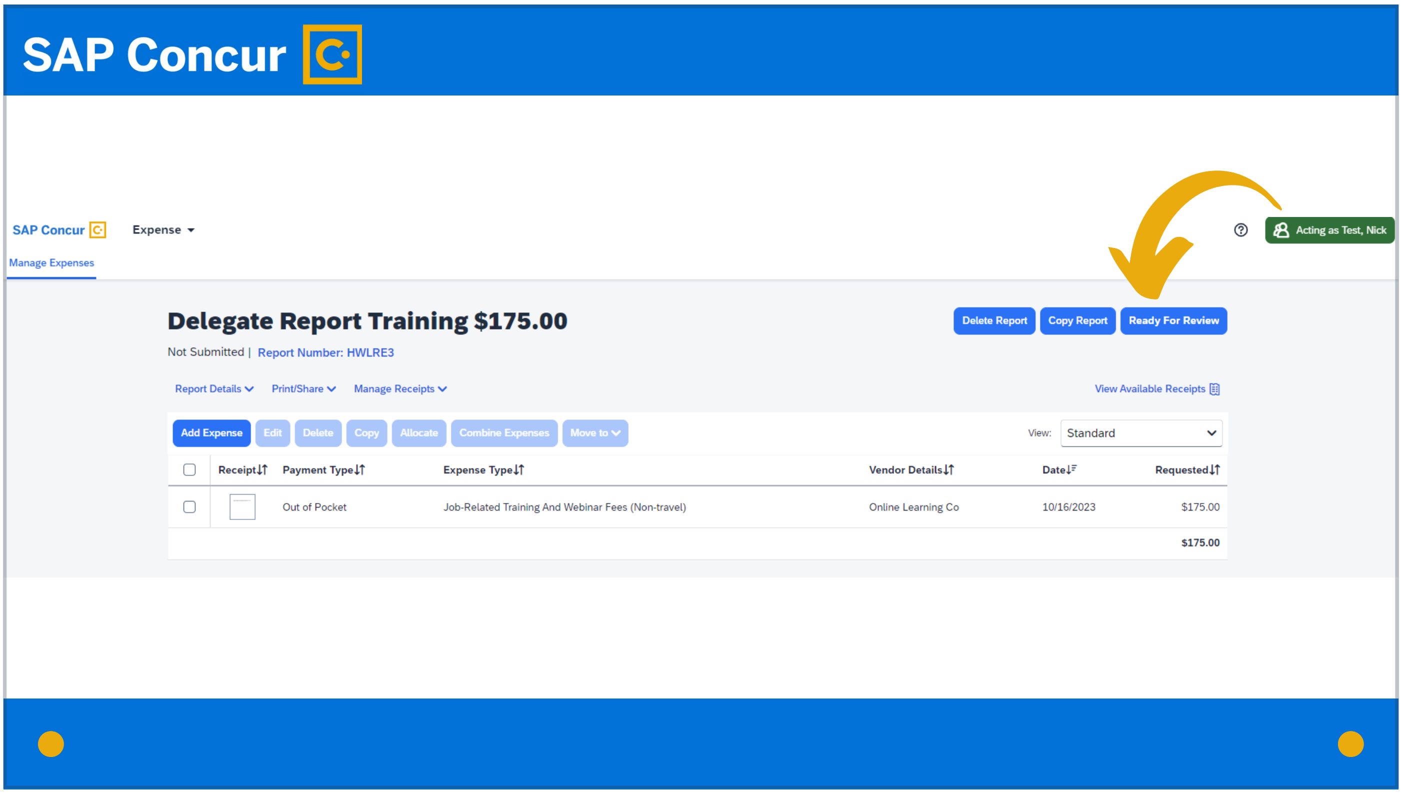
You will see that user's dashboard and can access any of that user's approvals, travel requests, and/or expense reports that you have been authorized to be responsible for.



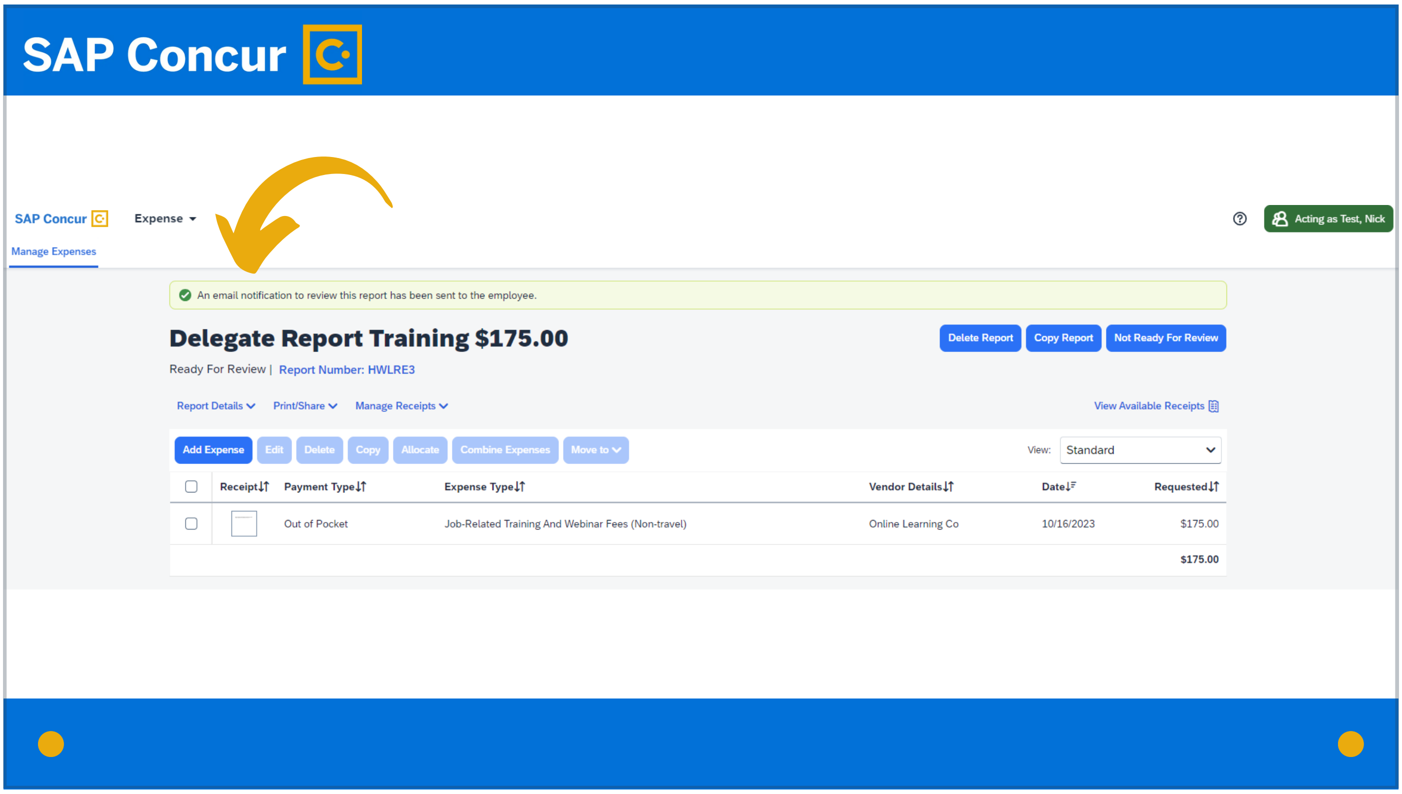
The process for approving requests or reports or creating them is almost completely synonymous with the process for approving or creating requests or reports for yourself. For full details on those topics, please refer to our Travel requests, Expense Reports, and/or Approvals training videos.



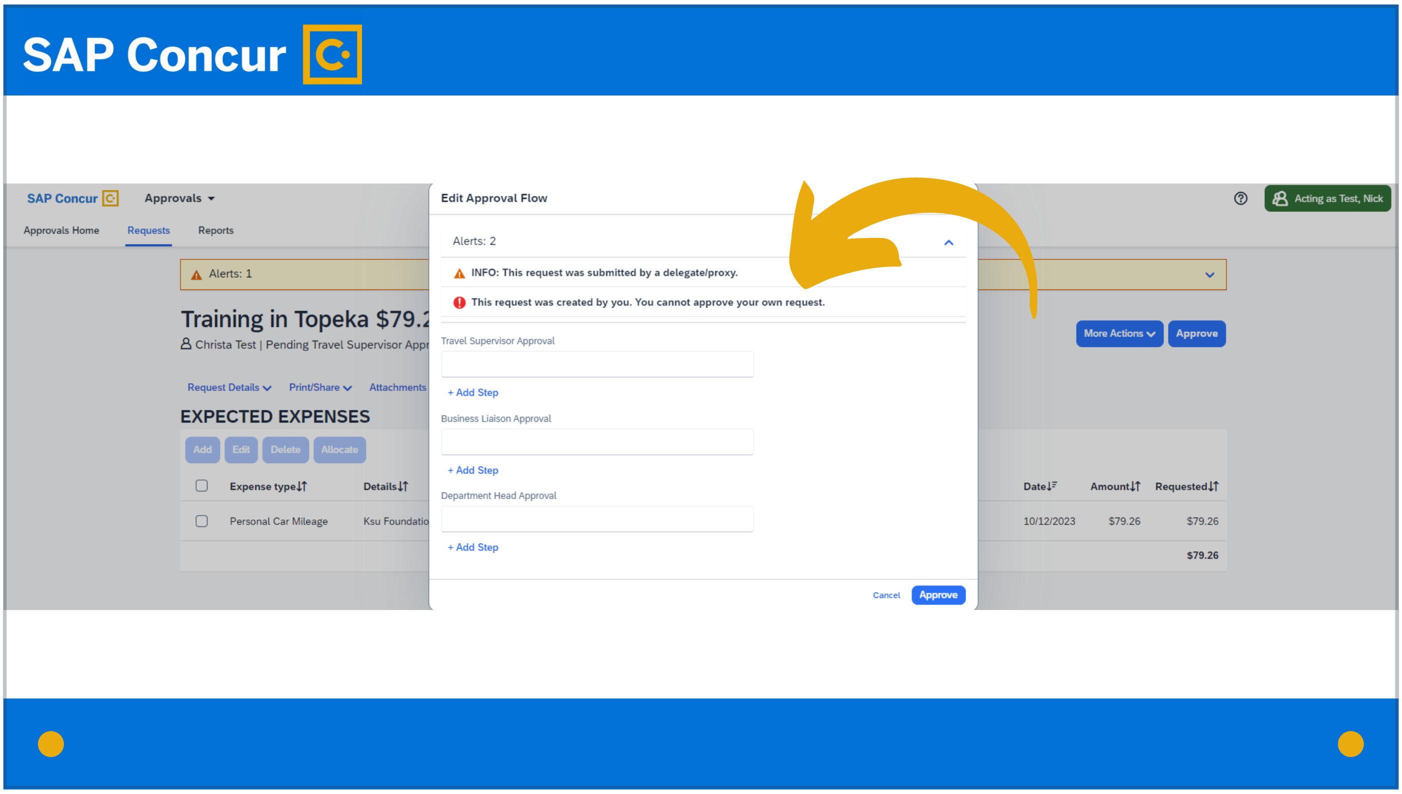
The difference you will experience as a delegate is that you cannot submit travel requests or expense reports. Submissions have to be done by the person who owns the request or report—whose profile it belongs to. So instead of seeing a Submit button when you are ready to turn in the request or report, you will see either a Notify Employee button for travel requests



or a Ready for Review button for expense reports.



Once you click on that button, an alert will generate near the top of the screen that tells you an email notification has been sent to the employee to review the request or report. It is then the responsibility of the employee to submit the request or report.



Also, on the approval side it is important to note that, as a delegate approver you cannot approve travel requests or expense reports that you created. The request or report must be approved by someone other than the person who created it.