Designating Delegates

These instructions cover how to designate delegates for your Concur account. By providing delegate(s) access to your account in Concur, delegate(s) can prepare reports or requests on your behalf.

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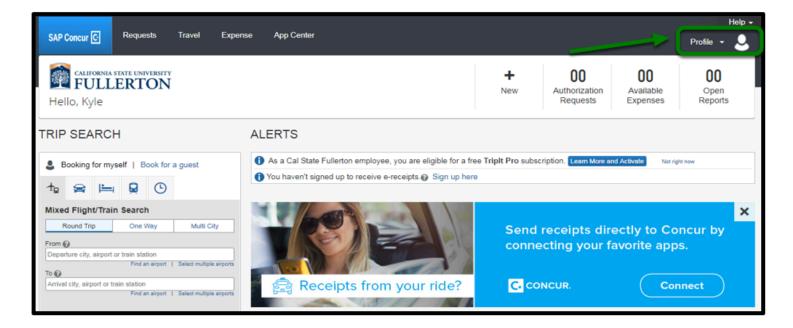
If you need assistance with logging into Concur, please go to Logging into Concur.

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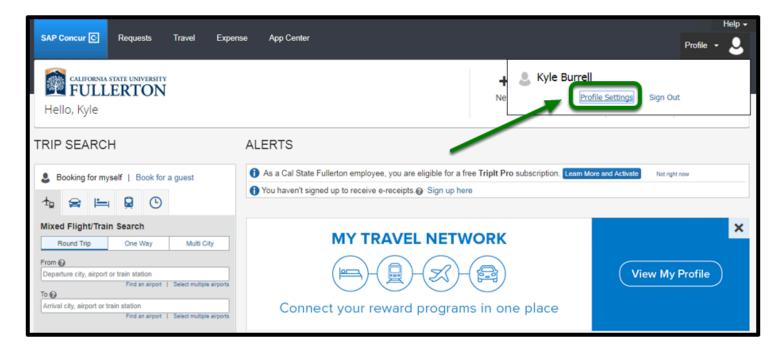
User's View

Adding a Delegate to your Profile

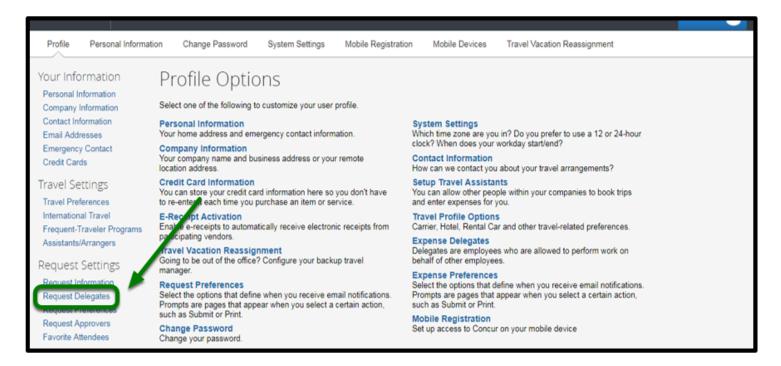
Step 1: Select Profile at the top right corner of the web page.



Step 2: Then, click on Profile Settings.



Step 3: Once redirected to your Profile Options, click on **Request Delegates** under Request Settings.



Step 4: You will be taken to the Request Delegates page. Select **Add** to add a delegate.

Profile	Personal Information	Change Passwo	rd System Settings	Mobile Registration	Mobile Devices	Travel Vacation Reassignment	
Your Info Personal In Company In Contact Info Email Addr	Iformation	Request D Pelegates Delegate	0				
Emergency Credit Card	Contact		ete	on behalf of other employees.			
Travel Se			e delegates. By assigning permi		ssigning permissions for l	Expense and Request.	
Travel Pref	-	Name	Can Prepare	Can View Receipts	Can Us	e Reporting	Receives Emails
Internationa Frequent-T Assistants/	raveler Programs			N	o records found.		
Request	Settings						
Request In Request De							

Step 5: A field will open up for you to type in the delegate's name. Enter the delegate's name, and then click on the name in the results, under the drop-down.

Profile Personal Informat	tion Change Password	System Settings	Mobile Registration	Mobile Devices	Travel Vacation Reassignment	ł
Your Information Personal Information Company Information Contact Information	Request Dele Delegates Delegate For	, ,	Hanna 19 gaaraa			
Email Addresses Emergency Contact Credit Cards Travel Settings Travel Preferences	Add Save Delete Delegates are employees who are a	sliowed to perform work	on behalf of other employees.	/		
International Travel Frequent-Traveler Programs Assistants/Arrangers	Expense and request share beiegs		can View Receipts		Expense and Request. se Reporting	Receives Emails
				lo records found.		
Request Settings Request Information Request Delegates			N	o records round.		
Request Information	ion Change Password	System Settings	N Mobile Registration	Mobile Devices	Travel Vacation Reassignmen	ıt
Request Information Request Delegates	ion Change Password Request Deleg Delegates Delegate For Add Son Delegate at one a	egates	Mobile Registration		Travel Vacation Reassignmen	n n

Step 6a: Once you click on the name, the delegate's name will automatically save into this row.

Re	Request Delegates												
Deleg	Delegates Delegate For												
Add	Save Delete												
You ma	ates are employees who are allo ay assign a temporary approver se and Request share delegate	r for a maxim	um of 30 days.			issions for Expense and Request.	*						
	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails					
	Penny, Hayden cmstraining38@fullerton.edu		۷		V								

Step 6b: Select the type of access you want the delegate to have. You may designate more than one.

A	Add Save Delete											
Your	Delegates are employees who are allowed to perform work on behalf of other employees. You may assign a temporary approver for a maximum of 30 days. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.											
	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails				
D	Penny, Hayden cmstraining38@fullerton.edu	V	۲		•		۷					

Step 7: Once you've chosen the appropriate access, select **Save**.

You will receive a message with "Your changes have been saved."

Your delegate does not get automatically notified, as such it is recommended to let your delegate know of their responsibilities.

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Name Can Prepare Can View Receipts Can Use Reporting Receives Emails Can Approve Can Preview For Approver Receives Approval Emails													
				o a delegate, you are	e assigning permis	ssions for Expense and Request.							
	ay assign a temporary approver			and the other omproyee									
Delega	ates are employees who are allo	wed to perfo	orm work on beha	if of other employee	s.								
Ad	Add Save Delete												
Deleg	Delegates Delegate For												
NC	Request Delegates												
Request Delegates													

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6 Types of Access:

Can Prepare

• The delegate can prepare your travel request and expense report on your behalf.

Can View Receipts

• The delegate can view the receipts you've uploaded.

Receives Emails

• The delegate will receive the same emails as you.

Can Approve Temporary

• Another approver can be set-up as a temporary approver for no more than 30 days.

Can Preview for Approver

• The delegate can preview travel requests and expense reports for you.

Receives Approval Emails

• The delegate can receive emails of travel requests and expense reports that have been sent to you for approval.

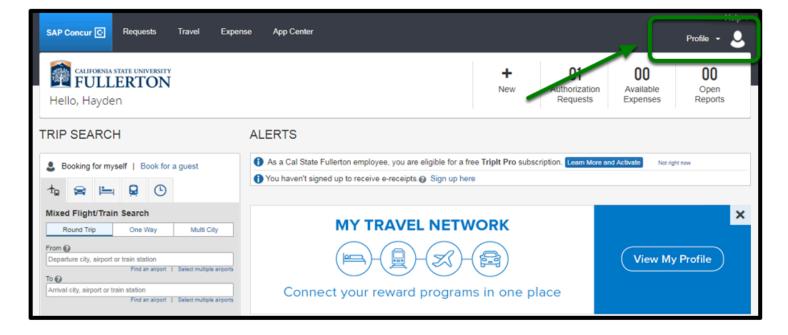
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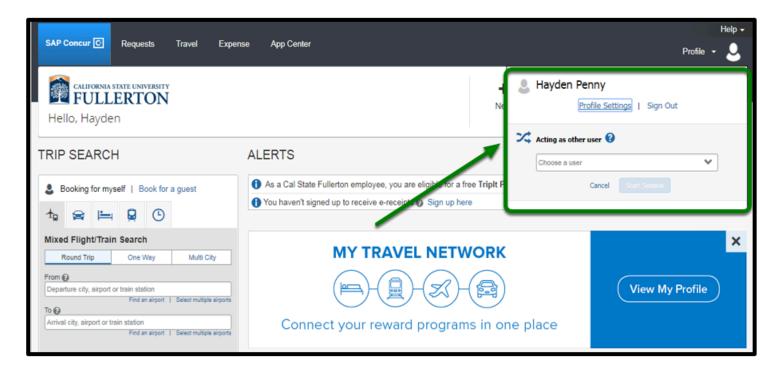
Delegate's View

How to Log In as a Delegate for Another Person

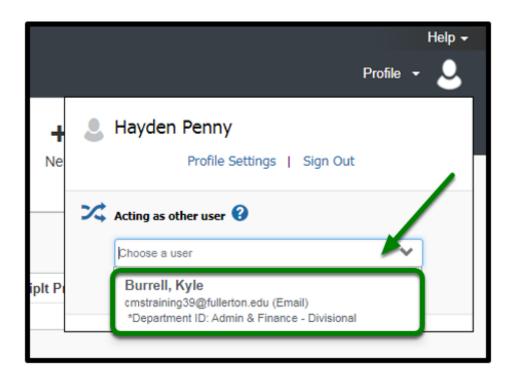
Step 1: Select **Profile** at the top, right corner of the web page.



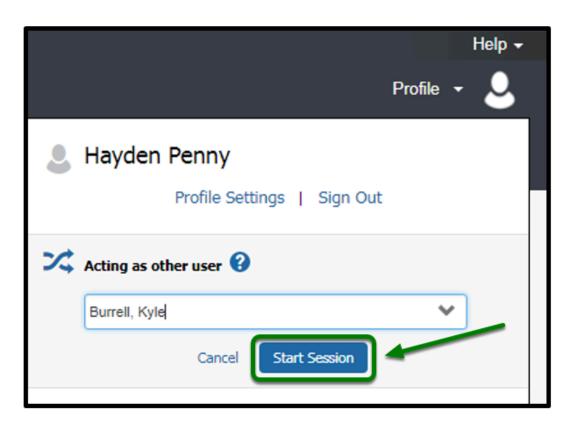
Step 2: In the profile, the delegate will have a new field called **Acting as other user**. Type in the user whom you are a delegate for, or click on the drop-down list.



Step 3: Select the user you would like to prepare request/reports or preview for by clicking on the name in the drop-down.



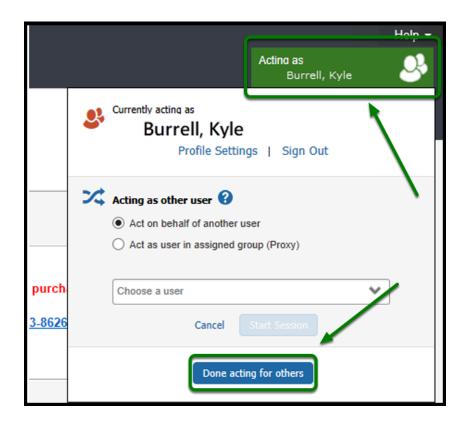
Step 4: After you have selected the name of the user, click on **Start Session**.



Step 5: Concur will then load the page as if you are viewing from the user's perspective. As noted in the green box, these are the areas that will indicate whose profile you are working in.

SAP Concur C Requests Expense										
CALIFORNIA STATE UNIVERSITY FULLERTON Burrell, Kyle	+ Start a Request	+ Start a Report	+ Upload Receipts	00 Authorication Requests	00 Available Expenses	OD Open Reports				
Book, expense and app Download the App C. CONCUR.	Book, expense and approve from anywhere.									

Step 6: Once you have completed delegating on behalf of someone else, click on the top right green box stating **Acting as.** Then, click **Done acting for others**.



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Need more help?

Contact Concur Support at <u>concur@fullerton.edu</u> or at 657-278-3600.