# SAP Concur C·

# ACTING AS A DELEGATE

## REQUEST A DELEGATE

Concur allows someone to act as a delegate of another user for several functions. The functions assigned to the delegate will be determined solely on the functions the user has authority to perform.

- Request/Expense User – A delegate may be assigned in order to have them create and submit Request and Expense Reports on a traveler's behalf.
- Travel Module User – Once the traveler has an approved Request, a delegate can make travel arrangements through the Travel module on behalf of the traveler.
- Approver Roles – Depending on the security roles a user has, a delegate can step in and assist the user with approval functions, but these functions are limited to only what the user, not the delegate, can perform.

In order to have someone set up as a delegate, please coordinate with your agency's CFO and the request can be made to Financial Systems Support. To see if you have delegates assigned to you or for you, check the *Request Delegates* and *Expense Delegates* in your Profile Options. ***(Note: Each delegate must be assigned certain security roles that can only be done by requesting through Financial Systems Support.)***
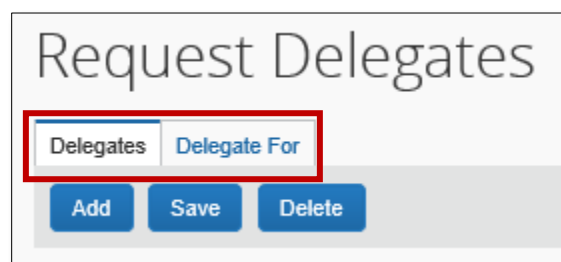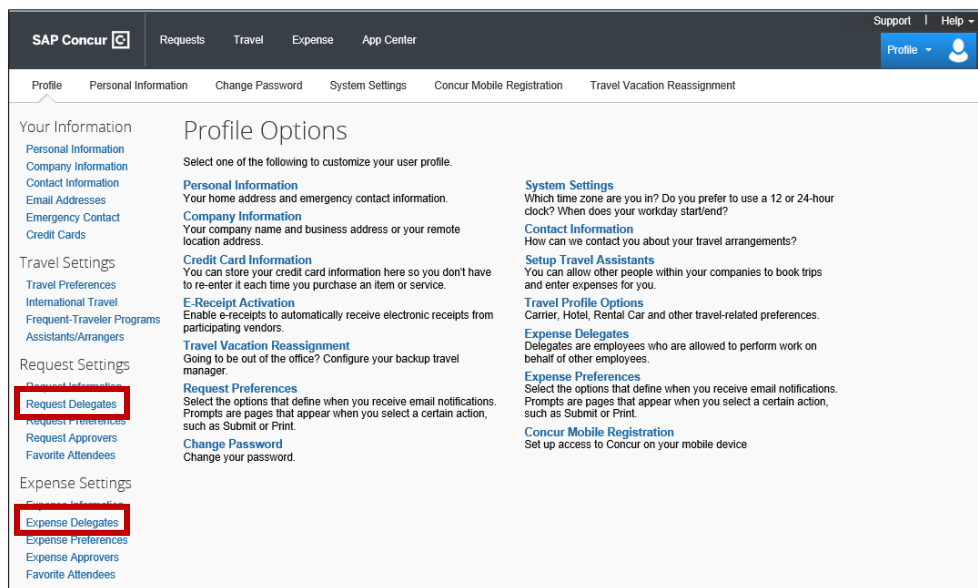
## Logging In As A Delegate

1. To access the information for the user you are acting as a delegate for, you will first log into <u>your</u> Concur profile.

2. Select **Profile** from the top right corner.

3. There will be a field for **Acting as other user**. Click in the field and a name or names will be visible for you to select from. *(Note: Only delegates that have been assigned to you will be visible in the search.)*
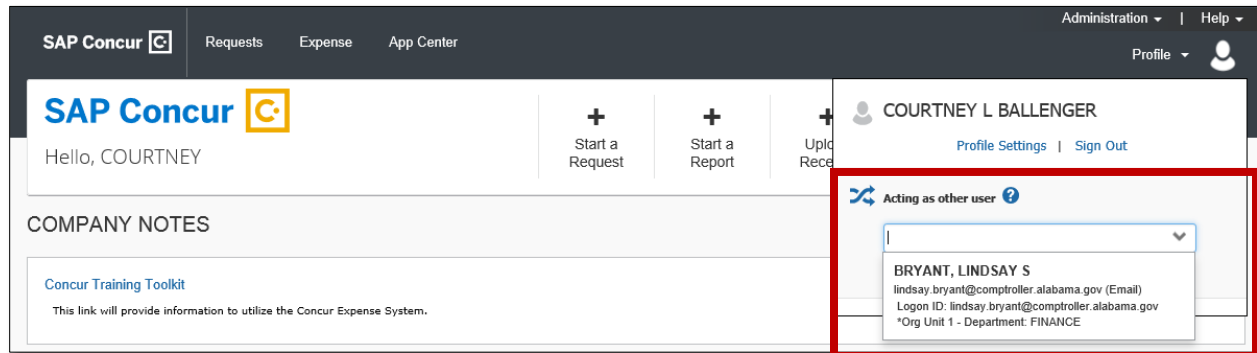


4. Once you have selected the correct user, click **Start Session**.
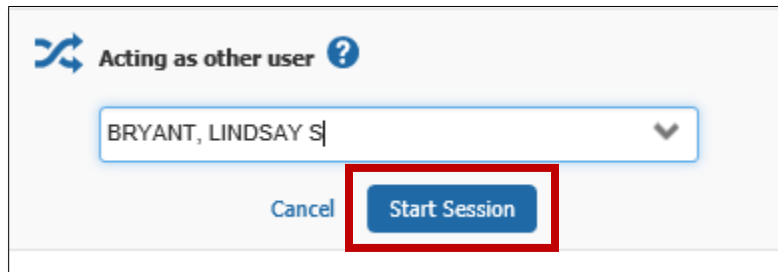


5. It should now display that you are acting as that user.
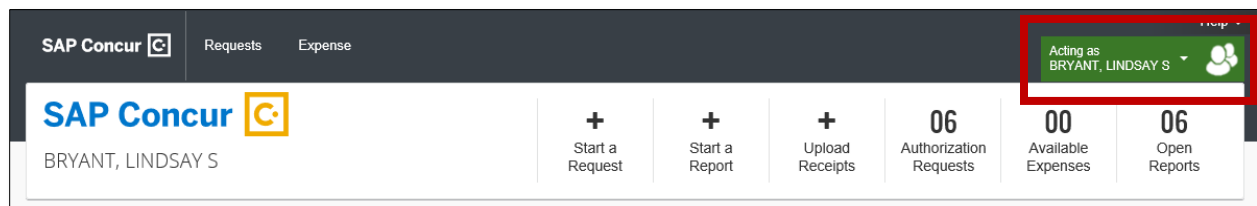
While you are acting as a user, you will be able to perform the functions that you have been given authority to do.  If you are acting as the traveler, you will be able to prepare and submit Requests, book travel and create the Expense Reports.  If you are acting as the approver, you will have the ability to view and approve Requests and/or Expense Reports.

There are job aids for each of these functions available at www.comptroller.alabama.gov/concur.

6.  When you are done acting as the delegate for the user, click the arrow by the user's name and you will be able to select **Done acting for others** to return to your profile.