

SAP Concur 

ACTING AS A DELEGATE





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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 to have the delegate create and submit Requests and Expense Reports on a traveler’s behalf.
- Travel Arranger – 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. *

To have someone set up as a delegate, please coordinate with your agency’s Concur contact so that a request can be made to the Comptroller’s Office. To see if you have delegates assigned to your profile, check the *Request Delegates* and *Expense Delegates* in your Profile Options.

**NOTE: Each delegate must be assigned the specified security roles, which can only be facilitated through a request to the Comptroller’s Concur Office.*

<p>Your Information</p> <ul style="list-style-type: none"> Personal Information Company Information Contact Information Email Addresses Emergency Contact Credit Cards <p>Travel Settings</p> <ul style="list-style-type: none"> Travel Preferences International Travel Frequent-Traveler Programs Assistants/Arrangers <p>Request Settings</p> <ul style="list-style-type: none"> Request Information Request Delegates Request Preferences Request Approvers Favorite Attendees <p>Expense Settings</p> <ul style="list-style-type: none"> Expense Information Expense Delegates Expense Preferences Expense Approvers Favorite Attendees 	<p>Profile Options</p> <p>Select one of the following to customize your user profile.</p> <p>Personal Information Your home address and emergency contact information.</p> <p>Company Information Your company name and business address or your remote location address.</p> <p>Credit Card Information You can store your credit card information here so you don’t have to re-enter it each time you purchase an item or service.</p> <p>E-Receipt Activation Enable e-receipts to automatically receive electronic receipts from participating vendors.</p> <p>Travel Vacation Reassignment Going to be out of the office? Configure your backup travel manager.</p> <p>Request Preferences Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.</p> <p>Change Password Change your password.</p>	<p>System Settings Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?</p> <p>Contact Information How can we contact you about your travel arrangements?</p> <p>Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you.</p> <p>Travel Profile Options Carrier, Hotel, Rental Car and other travel-related preferences.</p> <p>Expense Delegates Delegates are employees who are allowed to perform work on behalf of other employees.</p> <p>Expense Preferences Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.</p> <p>Concur Mobile Registration Set up access to Concur on your mobile device</p>
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Request Delegates

Delegates Delegate For

Add
Save
Delete



LOGGING IN AS A DELEGATE

To access the information of the user for whom you are acting as a delegate, please first log into your Concur profile.

Select **Profile** (your initials) from the top right corner.

There will be a selection labeled “A Delegate for another user who has granted you this permission”. 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.)*

The screenshot shows the SAP Concur Administration interface. The main area is titled "User Administration" and displays a "User List for company: Concur P...". A dropdown menu is open, showing options for "Act As": "Myself", "A Delegate for another user who has granted you this permission" (highlighted with a red box), and "An Administrator (Proxy) for other users". Below the dropdown, a search field contains "madsion" and a dropdown menu shows "NUMMY, MADISON B" with contact information: "madsion.nummy@comptroller.alabama.gov (Email)", "Login ID: madsion.nummy@comptroller.alabama.gov.uat", and "Employee Group: FINANCE".

Once you have selected the correct user, click **Switch**.

A close-up view of the search field containing "NUMMY, MADISON B" and a blue "Switch" button below it, both highlighted with red boxes.

It should now display that you are acting as that user.

The screenshot shows the SAP Concur interface with the user profile updated to "Acting as NUMMY, MADISON B". The profile is displayed in a green box in the top right corner of the page.



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 a traveler, you will be able to prepare and submit Requests, and prepare and submit Expense Reports. If you are acting as an 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.

When you are done acting as the delegate for the user, select “**Myself**” and you will be able to switch back to your profile.

