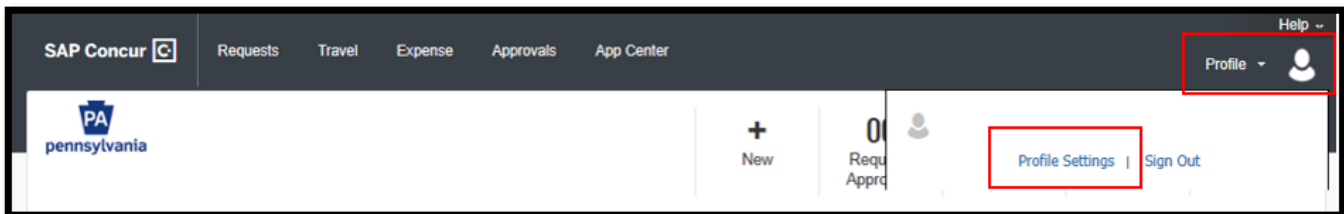


User Guide – Assigning a Delegate

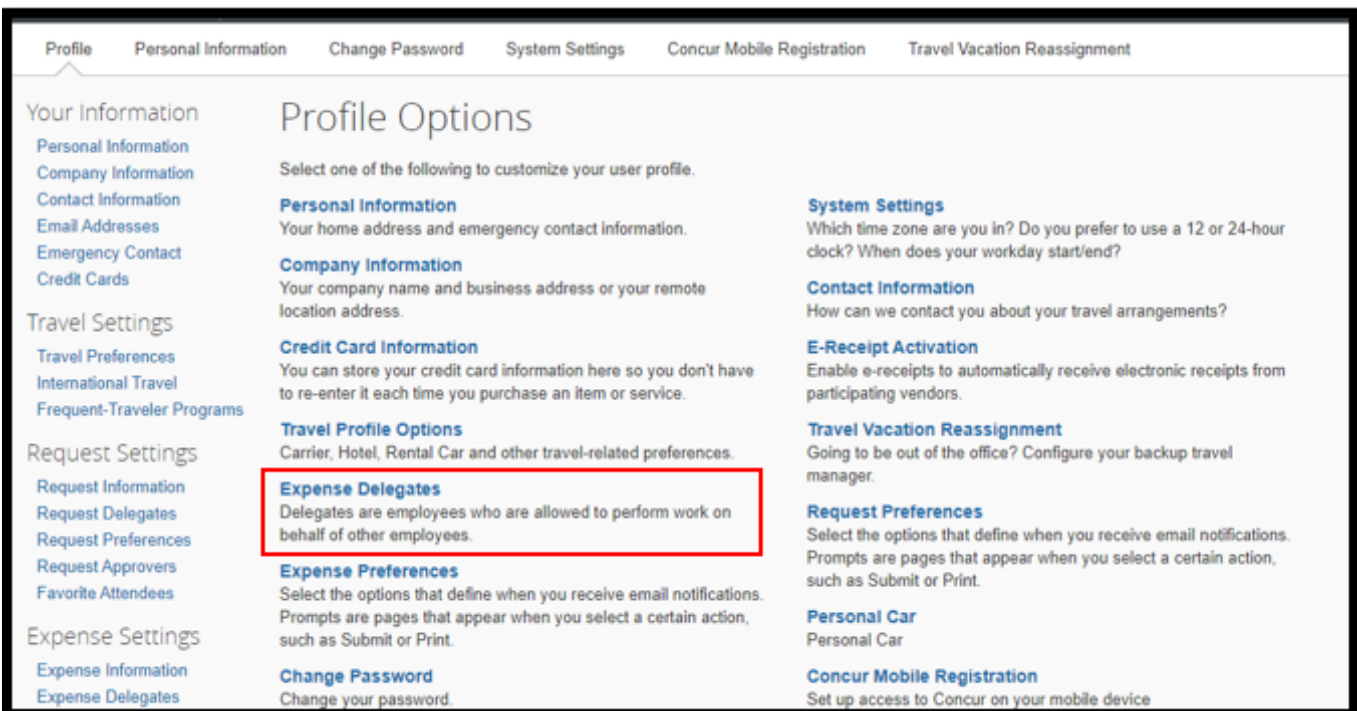
A delegate is a user who is granted permission to act on behalf of another user to perform tasks such as booking travel reservations, submitting expense reports, and/or approving expense reports. This user guide is intended to show how to assign a delegate.

Assigning a Delegate

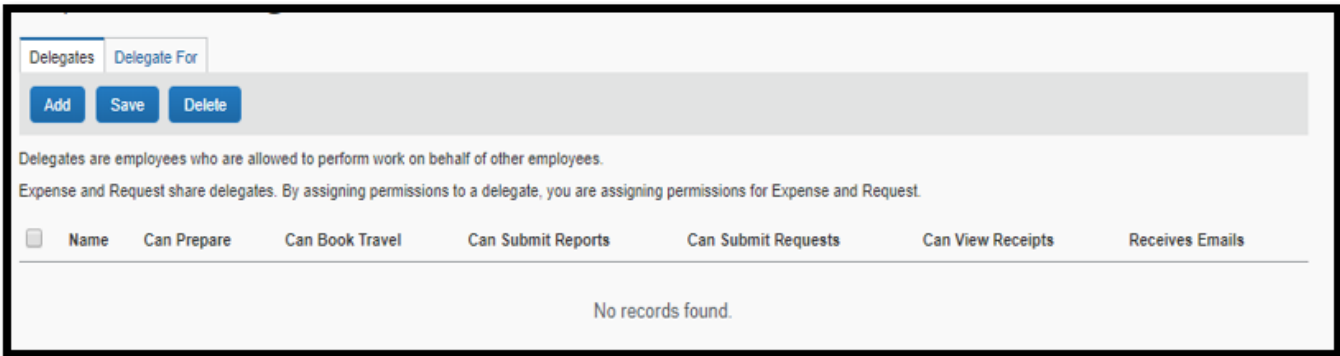
1. Sign into SAP Concur to access your home page. [Reference: SAP Concur User Guide – Signing In]
2. Click on the **Profile** dropdown arrow and select the **Profile Settings** link.



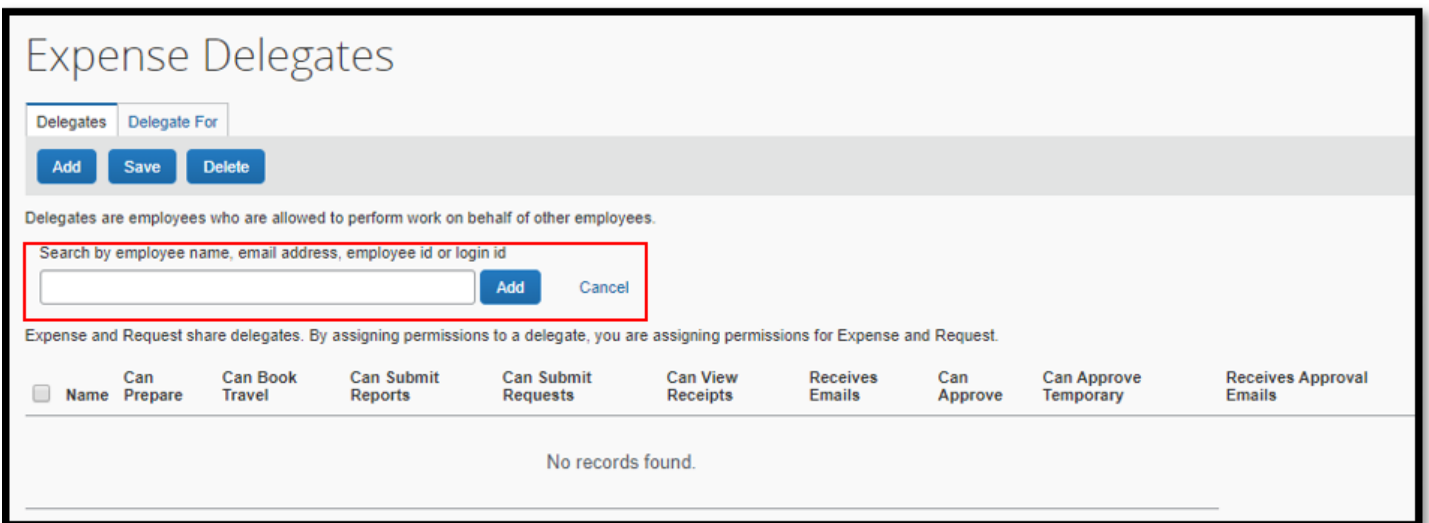
3. The profile menu is displayed. Click on the **Expense Delegates** link.



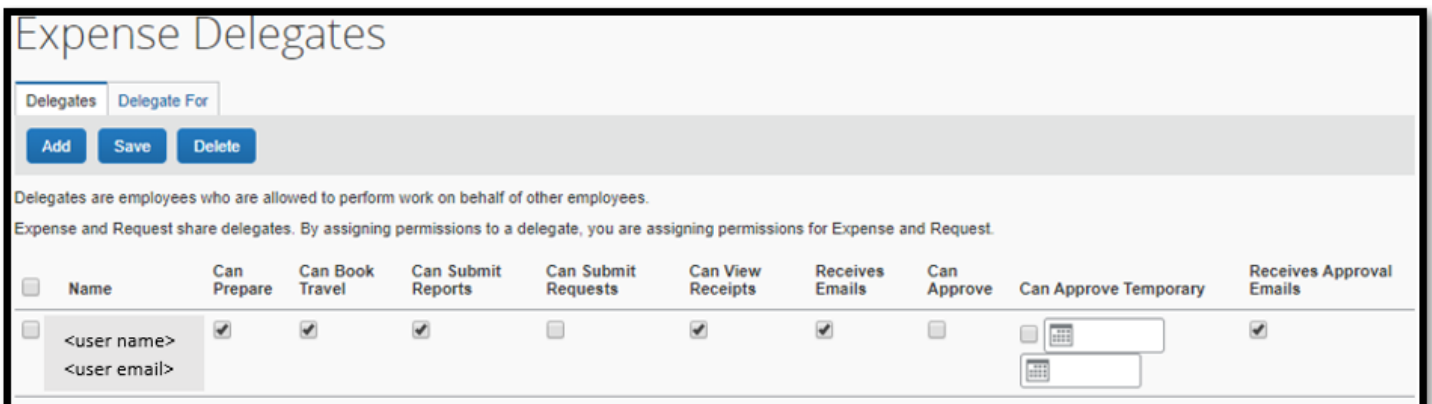
4. To add a delegate, click the **Add** button.



5. Search for an employee by typing their name, email address, or employee ID in the search box. Click on the employee's name when it appears in the list. Then click the **Add** button. Note: Only supervisors can assign approval permissions to another supervisor.



6. Click on the checkboxes that correspond to the functions that you want your delegate to perform on your behalf. It is recommended that you select the checkbox under **Receives Emails** as this will automatically alert the delegate if an expense report is returned to you from your supervisor or BCPO Travel Audits.



Below is list of descriptions for each option.

- **Can Prepare** – delegate can prepare expense reports on your behalf. You will still be required to submit the report.
- **Can Book Travel** – delegate can book travel reservations on your behalf.
- **Can Submit Reports** – delegate can submit expense reports on your behalf.
- **Can Submit Requests** – delegate can submit travel requests on your behalf.
- **Can View Receipts** – delegate can view your receipt store, e-receipts, receipt images, etc. This should check by default when selecting **Can Prepare, Can Book Travel, Can Submit Reports, Can Submit Requests, and Can Approve**.
- **Receives Emails** – delegate will be copied on all emails generated by Concur addressed to you.
- **Can Approve** – delegate can approve reports on your behalf. Only supervisors can delegate an alternate supervisor as an approver for their subordinates.
- **Can Approve Temporary** – delegate has temporary access to approve reports and requests on your behalf. Enter the date range for the temporary period. Only supervisors can delegate an alternate supervisor as an approver for their subordinates.
- **Receives Approval Emails** – delegate will be copied on all emails generated by Concur notifying you of requests and reports pending your approval.

When finished, click on the **Save** button.

The screenshot shows the 'Expense Delegates' page with a table of delegates. The 'Save' button is highlighted with a red box. The table has the following columns: Name, Can Prepare, Can Book Travel, Can Submit Reports, Can Submit Requests, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, and Receives Approval Emails. A single delegate is listed with the following permissions: Can Prepare (checked), Can Book Travel (checked), Can Submit Reports (checked), Can Submit Requests (unchecked), Can View Receipts (checked), Receives Emails (checked), Can Approve (unchecked), Can Approve Temporary (with date range input fields), and Receives Approval Emails (checked).

Deleting a Delegate

To delete a delegate that has been previously added, check the box to the left of their name and click the **Delete** button.

The screenshot shows the 'Expense Delegates' page with the 'Delete' button highlighted with a red box. The checkbox next to the delegate name is also highlighted with a red box. The table has the following columns: Name, Can Prepare, Can Book Travel, Can Submit Reports, Can Submit Requests, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, and Receives Approval Emails. A single delegate is listed with the following permissions: Can Prepare (unchecked), Can Book Travel (unchecked), Can Submit Reports (unchecked), Can Submit Requests (unchecked), Can View Receipts (unchecked), Receives Emails (unchecked), Can Approve (unchecked), Can Approve Temporary (with date range input fields), and Receives Approval Emails (unchecked).