Delegate Basics

A Delegate may:

- Prepare Travel Authorization Requests and Expense Reports (perform data entry) for others
- Receive document status change notifications
- Receive approval notifications and approve on behalf of another approver, OR
- Receive approval notifications and Preview (checkmark reviewed) before the approver

To Act as a Delegate: Log in to Concur. You may need to log in through MyWestern with your universal ID first.

1. In the drop-down upper-right of the Concur dashboard, click Profile
2. Begin typing the traveler’s name below to search and select from the list field under Acting as other user:

   ![Profile Settings](image)

   - If you do not have the Acting as other user option or the traveler’s name does not come up in the search, the traveler must assign you as a delegate in their Profile Settings. Travel Services can also enable delegate permissions.

3. Click Start Session. You are now acting as a delegate for this user, shown by the green label “Acting as . . .”: 

   ![Start Session](image)
4. To return to working for yourself, click label Acting As . . . and Done Acting for others

Users may Review/Assign Delegates by clicking on Request or Expense Delegates in Profile Settings. Permissions are separated by tabs: Delegates and Delegate For. Delegate updates are the same in both Request and Expense:

- You can delete travelers from your Delegate For tab. Travelers must add delegates in their own profiles. Travel Services can also enable delegate permissions.
- Check boxes for appropriate permissions for your Delegates: Can Prepare, Can Book Travel and Receives Emails
- Approvers may delegate approval permissions for a temporary or permanent time period; check Can Approve and Receives Approval Emails box. Previewer- may view and mark as Previewed for the Approver
- Remember to click Save after any addition or change