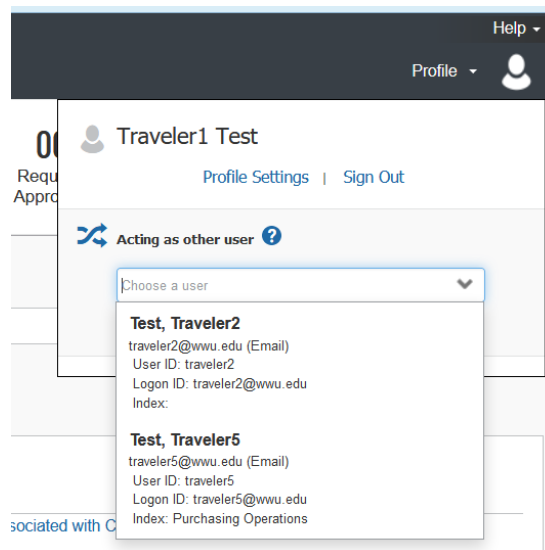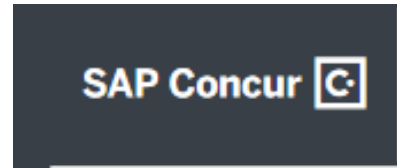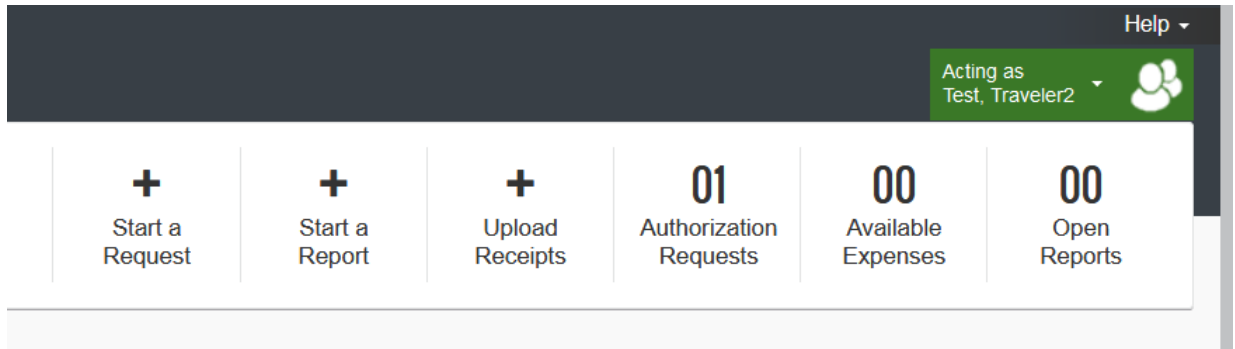# Travel Services

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:**

- **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 . . .":
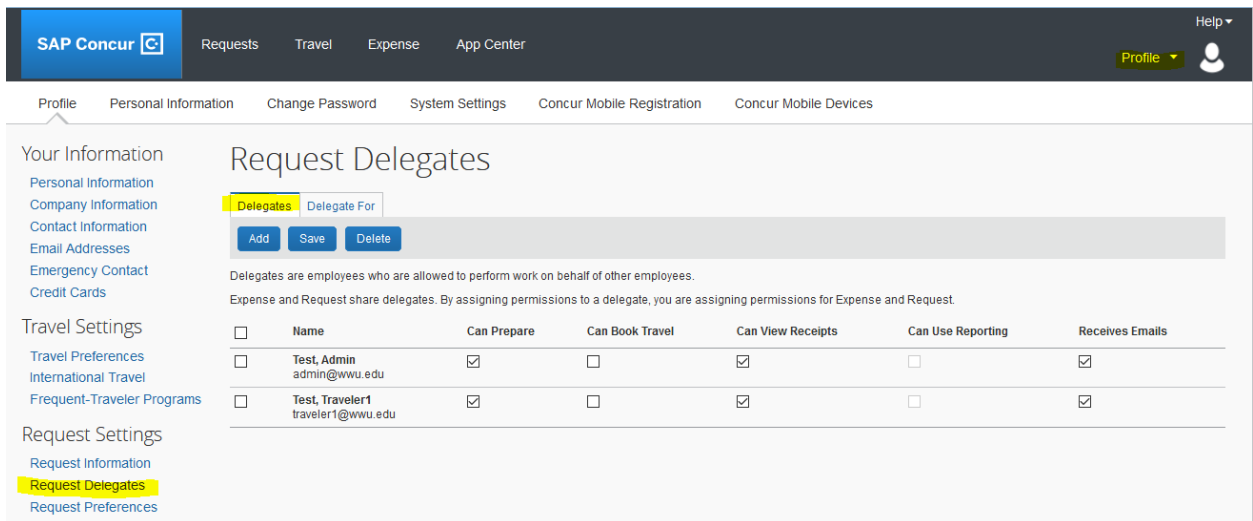
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Devlin Sweeney | Business & Financial Systems
devlin.sweeney@wwu.edu | 360.650.4550

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