

Travel Services

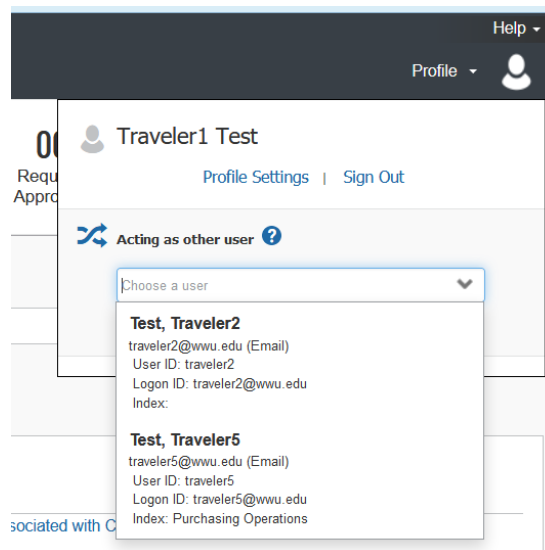
Delegate Basics

A Delegate may:

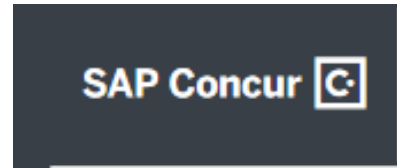
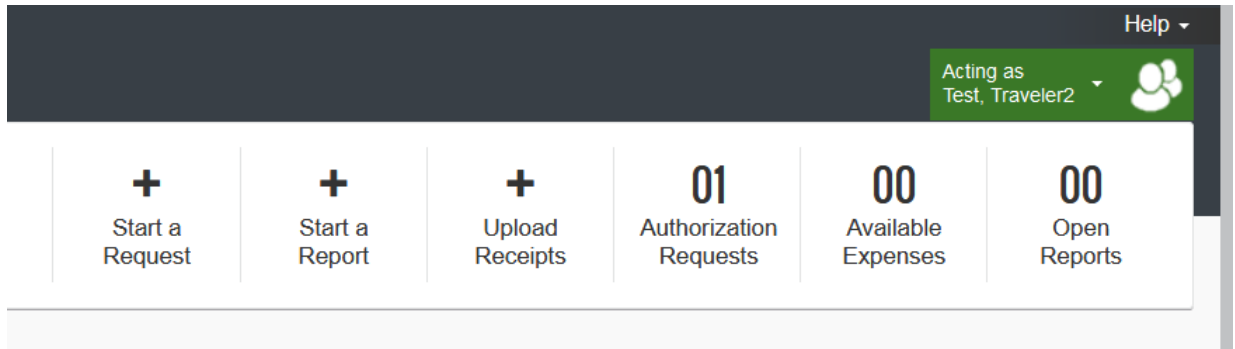
- Prepare Travel Authorization Requests and Expense Reports (perform data entry) for others
- Receive document status change notifications
- Receive approval notifications and approve on behalf of another approver, OR
- Receive approval notifications and Preview (checkmark reviewed) before the approver

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 . . .":

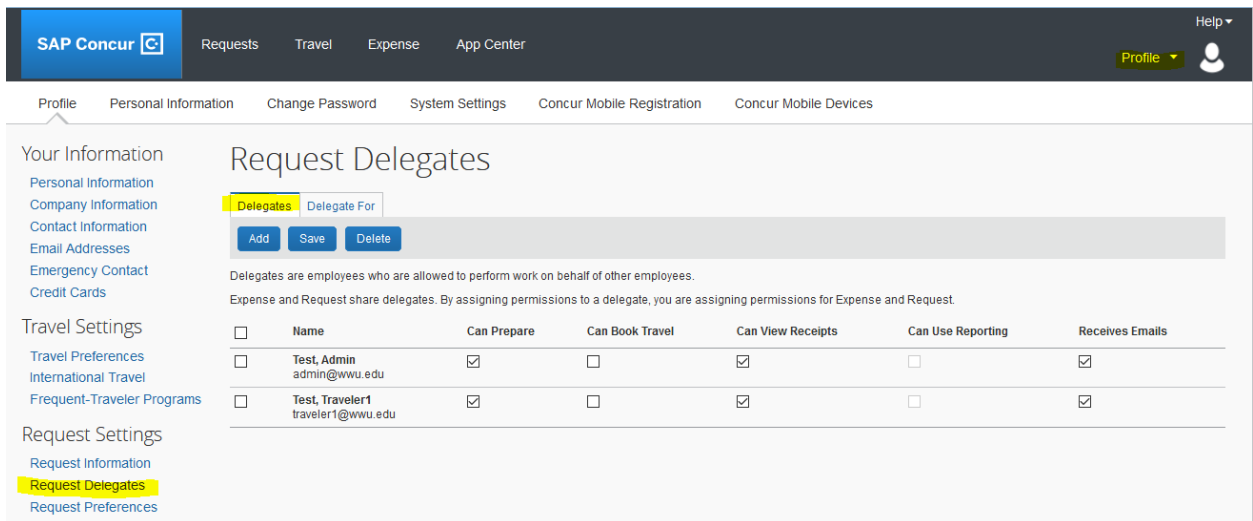
Help ▾


Acting as Test, Traveler2 ▾ 


+ Start a Request	+ Start a Report	+ Upload Receipts	01 Authorization Requests	00 Available Expenses	00 Open Reports
-----------------------------	----------------------------	-----------------------------	-------------------------------------	---------------------------------	---------------------------

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**:



SAP Concur  Requests Travel Expense App Center

Help ▾ Profile ▾ 

Profile Personal Information Change Password System Settings Concur Mobile Registration Concur Mobile Devices

Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards

Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs

Request Settings
Request Information
Request Delegates
Request Preferences

Request Delegates

Delegates Delegate For

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	Test, Admin admin@wwu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Test, Traveler1 traveler1@wwu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- 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