

Assigning a Admin (Delegate) to prepare and submit expense reports on your behalf

A. Vendors can assign another person ("Delegate or Admin") to prepare and submit their expense reports on their behalf. To assign a Delegate / Admin:

Note on Delegates: To select a delegate, it assumes the delegate has concur access already, they are active, and may have been billable or setup on a project in the past prior to selection. If the above is not the case, then the delegate must be setup in the system before they can be used as a delegate. Contact the help desk for assistance if setup is needed.

1. Click the **Profile** drop-down on the top right hand side of the screen and select **Profile Settings.**

C CONCUR Expense Approvals App Cente		Profile + 🚨
C. CONCUR Hello, Kevin	Start a Up Report Rec	& Kevin Emp
COMPANY NOTES		Choose a user
T&E Policy T&E Country Charts Concur Training Toolkit This link will provide information to utilize the Concur Expense System	~	Careal Social
INY TASKS 00 Required Approvals →	56 Available Expenses →	99+ Open Reports →
Great! You currently have no approvals.	09/02 Islandia, New York AUD 55:00	10/03 A Hard Day's Night \$332.52
	08/02 VisaPhone \$55.70	09/26 KD Services report 1 \$109.22
	08/01 VisaPhone \$17.68	09/26 KD Services report 1 \$1,344.18
	07/31 AUTOHANSA RENT-A-CAR AUD 1,179.48	09/25 KD Services report 1
	07/31 Express Payment Service Merchant	09/23 Dear Prudence

2. In the left hand margin, select Expense Delegates.



- 3. To select a Delegate / Admin and authorize activities they can perform on your behalf:
 - a. Click the **Add** button and then use the search field (same as you do in Outlook) to find the person you wish to assign as your Delegate. When the name appears, single click on it.



Expe	nse Delegates				
Delegates	Delegate For				
Add	Save Delete				
Delegates are	e employees who are allowed to perform v	work on behalf of other em	ployees.		
	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails
	Shah, Heeral heeral.shah@ca.com				

- b. Check the boxes that describe the permissions you are giving to the delegate, i.e., the activities they can do on your behalf.
- c. Click Save.
- d. **Note**: You can assign multiple Delegates, with different responsibilities (or the same), based on the boxes checked next to their name.

B. Admin Acting as a Delegate

To see who you have been assigned to act as a Delegate for:

1. Click the **Profile** drop-down on the top right hand side of the screen and select **Profile Settings.**

C. CONCUR	+ Start a	+ Upic	Mickey Emp	04
Hello, Mickey	Report	Rece		
OMPANY NOTES			Choose a user	~
New process for the travel diary submission			Cancel Start Secolo	
T&E Policy T&E Country Charts	ore details about th	e travel día		
TAE Policy TAE Country Charts Concur Training Tookit This link will provide information to utilise the Cencur Bup	ore details about th	e travel dia		Read more
Refer to FAQ document to know more about the poor <u>TAE Price</u> ; <u>TAE Pr</u>		e travel dia	38 Open Reports	Read more

2. In the left-hand margin, select **Expense Delegates > Delegate For** tab

C- CONCUR Exper			App Center					\frown	Profile -
Profile Personal Infor	nation	Change Pass	word Syste	m Settings N	Aobile Registration			💄 Mickey Emp	
our Information	Ex	pense	Delega	tes				Profile Settings	s Sign Out
Personal Information Company Information		ates Delegat	<u> </u>					X Acting as other user 😗	
Contact Information		-						Emp. Kevin	×
Email Addresses	De	ete							tart Session
xpense Settings	This e	mployee may act a	s a delegate for the	sisted employees.				Cancel	tart Session
Expense Information Expense Delegates	You m	ay assign a tempor	ary approver for a	maximum of 30 days					
Expense Preferences		Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Appro	ve Can Approve Temporary	Receives Approval Email
Expense Approvers Favorite Attendees	-	Emp Keylo							
		Emp, Kevin helio@test: ates	t.com					EH	
ther Settings									
System Settings									
Connected Apps Concur Connect									
Concur Connect Change Password									
Mobile Registration									

- C. To work as a delegate:
 - 1. Click **Profile** > **Acting as other user**. Select the appropriate delegator's name from the drop-down.

Profile Personal Infom	ation	Change Password	Syste	m Settings N	lobile Registration		8	Mickey Emp	
Your Information	Expense Delegates							Profile Settings Sign Out	
Personal Information Company Information Contact Information Email Addresses	Delega	Delegate For					\triangleleft	Acting as other user 🕐	~
Expense Settings Expense Information	This error	Debter This employee may act as a delegate for the listed employees. You may assign a temporary approver for a maximum of 30 days.						Cancel	art Session
Expense Delegates Expense Preferences		Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
Expense Approvers Favorite Attendees		Emp, Kevin helo@test:atest.com							
Other Settings System Settings Connected Apps Concur Connect Change Password Mobile Registration									

- 2. Click Start Session. Profile menu will now display Acting as and shows the name you just selected. You are now working on behalf of that person and can complete the tasks that you were assigned.
- 3. To select a different user, start again with step 1 above but select a different Delegator.
- 4. To return to your own tasks, click Done acting for others.

For any technical issues or assistance with the Concur system, contact the GIS Service desk via any of the channels as mentioned below:

PHONE SUPPORT

The GIS Service Desk can be reached on the below listed contact numbers. We operate 24x7.

Region	Telephone Numbers				
North America / Latin America	Toll: +1-631-342-3955				
,,	Toll Free: +1-877-742-2435				
EMEA	Toll: +44 1753 242223				
APJ	Toll: +61 2 8898 2510				
India	Toll Free: 0008004402472				