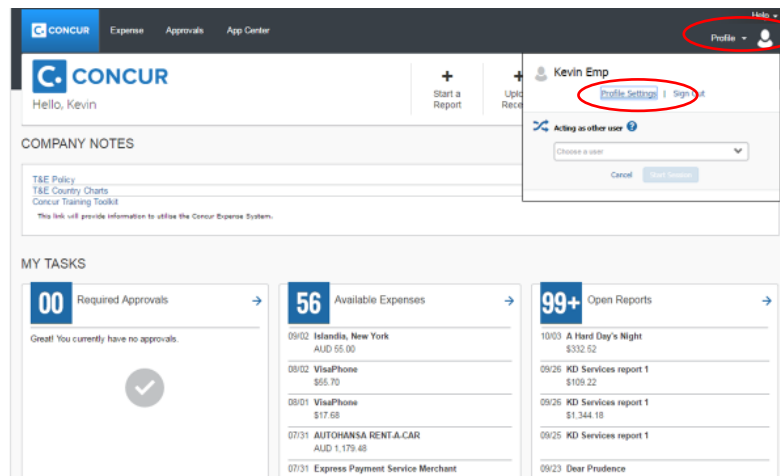


Assigning a Admin (Delegate) to prepare and submit expense reports on your behalf

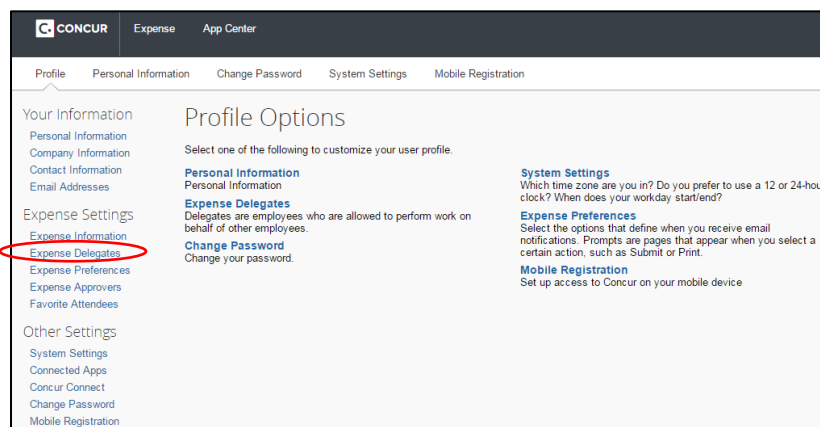
- A. Vendors can assign another person (“Delegate or Admin”) to prepare and submit their expense reports on their behalf. To assign a Delegate / Admin:**

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**.



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.

Expense Delegates

Delegates Delegate For

Add **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails
<input checked="" type="checkbox"/>	Shah, Heeral heeral.shah@ca.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Check the boxes that describe the permissions you are giving to the delegate, i.e., the activities they can do on your behalf.
- Click **Save**.
- 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:

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

CONCUR Expense Approvals App Center

Hello, Mickey

COMPANY NOTES

New process for the travel diary submission
Refer to FAQ document to know more about the process around the travel diary in Concur. for more details about the travel diary submission process.

T&E Policy
T&E Country Charts
Concur Training Toolkit

This link will provide information to utilize the Concur Expense System.

MY TASKS

00 Required Approvals →
Great! You currently have no approvals.

00 Available Expenses →
You currently have no available expenses.

38 Open Reports →
14/01 11:01 AM

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

CONCUR Expense Approvals App Center

Profile Personal Information Change Password System Settings Mobile Registration

Expense Delegates

Delegate Delegate For

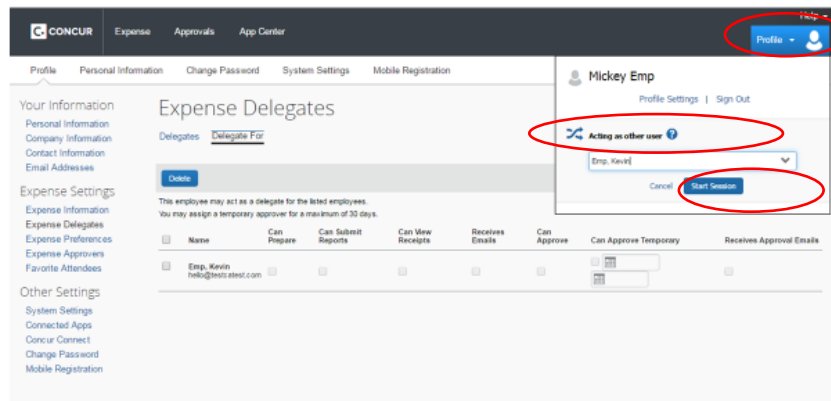
Emp. Kevin

This employee may act as a delegate for the listed employees. You may assign a temporary approver for a maximum of 30 days.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input checked="" type="checkbox"/>	Emp. Kevin kevin@ca.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

C. To work as a delegate:

- Click **Profile > Acting as other user**. Select the appropriate delegator's name from the drop-down.



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