

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 Center		Profile + 🚨	
C. CONCUR Hello, Kevin	Start a Up Report Rec	Kevin Emp	
COMPANY NOTES		Choose a user	
T&E Policy T&E Country Charts Concer Training Tookit This link, will pravide information to etitize the Concer Boyerse System		Carol Source	
IY 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 \$65.70	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	00/25 KD Services report 1	

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	Expense Delegates						
Delegates	Delegate For						
Add	Add Save Delote						
Delegates are employees who are allowed to perform work on behalf of other employees.							
	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.**

CONCUR Expense Approvals App	Center				Help • Profile • 🚨
C. CONCUR Hello, Mickey		+ Start a Report	4 Upic Rece	Mickey Emp	ut
COMPANY NOTES				Choose a user	*
Refer to FAQ document to know more about the process T&E Policy T&E Country Charts Concur Training Toolkit This link will provide information to ublike the Cencur Expense	around the the travel diary in Concur. for m	nore details about th	e travel dia		
MY TASKS					Read more
00 Required Approvals	→ OO Available Exper	nses	→	38 Open Reports	÷
Great! You currently have no approvals.	You currently have no approvals. You currently have no available expense			14/01 trist	
-				02/09_abc	

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

C. CONCUR Expense	Approvals Ap	p Center						Help - Profile - 💄
Profile Personal Information	n Change Passiic	rd Syste	m Settings	Mobile Registration			. Mickey Emp	
Your Information	Expense [)elega	tes				rrofile Setting	ps Sign Out
Personal Information Company Information	Delegates Delegate	For					🔀 Acting as other user 🔞	
Contact Information							Emp. Kevin	*
Email Addresses	Dokte						Carrol	Chart Country
Expense Settings	Expense Settings This exployee may so as a deligate for the listed employees.							
Expense Delegates	You may assign a temporar	y approver for a	maximum of 30 day	s.				
Expense Preferences	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Appr	ove Can Approve Temporary	Receives Approval Emails
Expense Approvers Favorite Attendees	Emp, Kevin helio@test: atest.c							
Other Settings								
System Settings								
Connected Apps								
Concur Connect Chapper Parceword								
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.

C. CONCUR Expens	e Approvals App (Senter					Profile - 🕗
Profile Personal Information Your Information Personal Information Company Information	tion Change Password Expense Delegates Delegate Fo	^{System Sett} elegates	ings Mobile Registratio	n		Mickey Emp Profile Settings Acting as other user	Sgn Out
Contact Information Email Addresses Expense Settings Expense Information Expense Defeates	Dokte This employee may act as a dr You may assign a temporary at	legate for the listed e sprover for a maximu Gan Can	mployees. n of 30 days. Submit Can View	Receives	Çan	Emp. Kevin	rt Season
Expense Approvers Expense Approvers Favorite Attendees	Emp, Kevin helo@testsatest.com						
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
АРЈ	Toll: +61 2 8898 2510
India	Toll Free: 0008004402472