Adding a Delegate

A delegate is a user who is granted permission to act on behalf of another user to perform tasks such as creating, submitting, and approving expense reports

1. To add a delegate to your user profile, select **Profile**, and then select **Profile Settings**.



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For this example, you will see how to add an Expense delegate.

2. On the **Profile Options** page, select **Expense Delegates**.



A delegate will need the same level or higher permissions to act on your behalf.

3. To add a new delegate, from the **Delegates** tab, select **Add**.



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| Your Information | Expense Del | egat | es | | | | | |
|--|---|----------------|-----------------------|----------------------|--------------------|----------------|--------------------------|--------------------------------|
| Company Information | Delegates Delegate For | | | | | | | |
| Contact Information Email Addresses | Add Save Delete | | | | | | | |
| Sponsored Guest Users Emergency Contact Credit Cards | Delegates are employees who are Search by employee name, ema | | | n behalf of ot | her employee | s. | | |
| Travel Settings | Expegie hare deleg | ates. By ass | igning permiss | Add | Cancel | e assigning | permissions for Exp | ense and Reques |
| Travel Preferences International Travel Frequent-Traveler Programs | | Can Prepare | Can Submit Reports | Can View Receipts | Receives Emails | Can Approve | Can Approve Temporary | Receives Approval Emails |
| Assistants/Arra Request Ser | earch for t | he | _ | • | | 0 | | |
| Request Inform appr | opriate del | ega | ite. | | 0 | | | |
| Request Preferences | | | | | | | | |

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5. Assign permissions to the new delegate, using the appropriate check box(es).

Note: To allow a delegate to email receipts into a user's Available Receipts library, you must select the Can View Receipts check box.

6. When you are done assigning all the delegate permissions, select **Save**.

| Travel Settings | Name | Can Prepare | Can Submit Reports | Can View Receipts | Receives Emails | Can Approve | Can Approve Temporary | Receives Approval Emails |
|---|---|----------------|-----------------------|----------------------|--------------------|----------------|--------------------------|--------------------------------|
| Travel Preferences International Travel Frequent-Traveler Programs | Andersson, Erik Is-traveler- sv@p00103105exu.se | | | | | | | |
| Assistants/Arrangers | Bauer, Thomas Is-traveler- de@p00103105exu | | | | | | | |
| Request Settings | | | | | | | | |
| Request Information Request Delegates | Dorsey, Kevin kevind@p00103105.com | | | V | | | 11/18/2014 11/25/2014 | |
| Request Preferences Request Approvers Favorite Attendees | Dupont, Martin Is-traveler- fr@p00103105exu | | | | | | | |
| Expense Settings Expense Information Bank Information Expense Delegates Expense Preferences | Hansen, Hans Is-traveler- no@p00103105exu.no | | | | | | | |
| | Hansen, Jens S Is-traveler- da@p00103105exu.dk | 0 | | | | 0 | | |
| Expense Approvers Company Car Favorite Attendees | Janssen, Peter Is-traveler- nl@p00103105exu.nl | | | | | | | |
| Invoice Settings | Kowalski, Adam Is-traveler- pl@p00103105exu.pl | | | | | | | |
| Invoice Information Invoice Delegates Invoice Preferences | Never, William suep_ls_en@p00103105exu | | 0 | 9 | | | | |
| Other Settings | Ninguém, João Is-traveler- ptbr@p00103105exu | 0 | | 0 | ٥ | | | |



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To allow a delegate to email receipts, both you and the delegate must verify your email addresses in your respective **Profile Settings** and email accounts.

7. To verify an email address, select **Profile**, and then select **Profile Settings**.

You must first verify your email address, and then the assigned delegate (acting on your behalf) and verify their email address to enable receipt submission via email to receipts@concur.com.

- To begin the email verification process, select Email Addresses.
- In the Email Addresses section, select Travel Arrangers/Delegates.







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10. To verify your email address, select Verify, and then in the Verification Email Sent pop-up window, select OK.



| Email Addre | esses | | | | Go to top |
|---|--|-------------------------------|----------------|--------------------|----------------------------------|
| Please add | at least one email address. | | | | |
| How do I | add an email address? | | | | |
| Travel Arr code, Tra | access / Delegates awgers and Delegates can initiate th vel Arrangers and Delegates should nour on behalf of another user. An E | verify their email address in | n their own pr | ofile. A Travel An | ranger can forward a |
| The follow | ving must be complete: | | | | |
| 2. The Us | avel Arranger or Expense Delegate er should verify email address in ov avel Arranger or Expense Delegate | m profile | | | pectively. |
| - The Arra line of the - The Del | se steps are complete: anger can send the trip email to plan email egate can send the receipt email to ne of the email. | | | | and a subscription of the second |
| | ensure that the trip or receipt is asso | clated to the correct user | | | |
| | | chaited to the contest user. | | | |
| | Id I verify my email address? | | | | |
| Flow do I | verify my email address? | | | | Add an email address |
| | Email Address | Verification Status | Verify | Contact? | Actions |
| Email 1 | surp_is_en@p00103105exu | Not Verified | Verity | Yes | |
| Sponsored | Guest Users | 1 | | | Go to top |
| Below are th | ne non-staffinon-employee users you | u are sponsoring | | | |
| | | | | | bosored Guest User |
| 10 March 10 | | | | | |
| Your Sponso | ned opera | Solo | ot V | orify | publied obest open |
| Your Sponse | | Sele | ct V | erify | - |

11. For verification purposes, type the code (sent by SAP Concur) in the **Enter Code** field, and then select **OK**.

Note that you can copy and paste the code in the **Enter Code** field.

| Email Add | fresses | | | | Go to | top |
|---------------------------------|--|-----------------------------------|--------------------|---------------------|-------------------|-------|
| Please ad | d at least one email address. | | | | | |
| How do | I add an email address? | | | | | |
| Travel / code. T | Arrangers / <u>Delegates</u> Arrangers and Delegates can initiat ravel Arrangers and Delegates sho Concur on behalf of another user. An | uld verify their email address in | n their own p | rofile. A Travel An | ranger can forwar | rd a |
| The foll | owing must be complete: | | | | | |
| 2. The I | Travel Arranger or Expense Delega User should verify email address in Travel Arranger or Expense Delega | own profile | | | pectively. | |
| - The A line of t - The D | nese steps are complete: rranger can send the trip email to p he email. elegate can send the receipt email line of the email. | | | | | oject |
| This wil | I ensure that the trip or receipt is as | ssociated to the correct user. | | | | |
| Why sh | ould I verify my email address? | | 5 | | | |
| How do | l verify my email address? | | | | | |
| | | | | 0 | Add an email add | ress |
| | Email Address | Verification Status | Verify | Contact? | Actions | |
| Email 1 | suep_ls_en@p00103105exu | Check email for code | Resend Cancel | No | 2 🗈 | |
| | | Enter Code | | | | |
| | | 1.2 | OK | | | |

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Once both you and your delegate have successfully verified your email addresses, a delegate can email receipts on your behalf for use in expense reporting.

The delegate will send an email to receipts@concur.com with the attached receipt images.

Note: Enter only the user's (for whom you are delegating for) verified email address in the Subject line.



Emailed images sent by your delegate will display in the **Available Receipts** library of your profile, just as if you had done it yourself.

| Manage Expenses Cash Advan | Processor+ Administer Authorization Requests |
|--|---|
| Manage Expense REPORT LIBRARY Vew | |
| Create New Report | |
| AVAILABLE EXPENSES | |
| | No Expenses When expenses come in, they will be added to this list. |
| Enable Expense As | stant and these expenses will be placed in a report for you. Learn Nove |
| AVAILABLE RECEIPTS truge Formets: jpg. pdf. tf, or bmp. | plinements: 2005pl or higher, 24 bit color (3.88 mega-pline) or higher for smartphones) |
| O Upload Receipt Imag SME Smit per file | INK CARTRIDEE |

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