HOW TO ACT AS A DELEGATE

If you are a delegate acting on behalf of another (delegator), you can:

• Make changes that affect only the delegator and do not change your personal information.
• Access only what the delegator has assigned to you.
  o Prepare requests.
  o Prepare expenses reports.
  o Attach receipts.
  o Receive email notification when a document status changed.
  o Approve request and/or expenses reports (if you are a delegate for an approver).

To work as a delegate:

• Open a Concur session using your own ID and password.
• Click Profile.
• In the Acting as other user field, start typing a name and then you will be able to select the name of the delegator on whose behalf you are working.
• Click Start Session.

You are now officially working on behalf of that person.

NOTE: If you can’t see this when you click on Profile, the traveller did not set you up as a delegate. The traveller must set you up as a delegate in order for you to be able to act as a delegate for him.

NOTE: The Profile drop-down now reads “Acting as” and shows the name you just selected.
To return to your own profile:

- Click Acting as.
- Click Done acting for others.

When the screen refreshes, you will be back to your own account and the “Acting as” drop-down will change back to “Profile.”