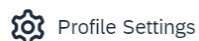**How to add a delegate in SAP Concur so they can carry out tasks on your behalf**

1. In the **Home Page** click on the **Profile** button in the top right hand corner of the screen.

AM

2. Then click on **Profile Settings**.

⚙ Profile Settings

3. In the Profile Options page click on

Expense Delegates

4. In the Delegates tab in the Expense

Delegates screen click on Add .

5. Search for and select the name of the person you wish to add as a delegate.

| Jordan Greenwood | | Add |

Jordan Greenwood

6. Then select the access options you wish to give the delegate, to allow access to update expenses and claims click on **Can Prepare** (this will automatically tick **Can View Receipts**)

Can Prepare	Can Submit Claims	Can View Receipts
☑	☐	☑

7. To enable the delegate to submit claims tick **Can Submit Claims**

Can Submit Claims

☑

8. To give ongoing access to approve Claims click on **Can Approve** (only users with the relevant access level can do this).

Can Approve

☑

9. To give access to approve Claims for a limited period tick **Can Approve Temporary** then add the Start and End dates in the date fields. (only users with the relevant access level can do this)

Can Approve Temporary

☑ 📅 20/05/2024
📅 24/05/2024

10. If you wish the delegate to receive approval emails tick **Receives Approval Emails** (only users with the relevant access level can do this)

Receives Approval Emails

☑

Acting as a Delegate for a colleague

1. To act as a Delegate when you have been given access click on the **Profile** button in the top right hand corner of the screen.

AM

2. Then click on **Act as Another User**

⤨ Act as Another User

3. Click on **Delegate for another user**
○ A Delegate for another user who has granted you this permission

4. Then search for their name

🔍 Search by name or ID ▾

McDonald, Alicia

5. Click on Switch

6. You will now be delegating for the other user, when delegating the Profile button will change showing the delegation.

👥 Acting as McDonald, Alicia

7. To go back to your own profile click on the green button then select **Myself**
Act As ❓
○ Myself

8. Then click Switch