

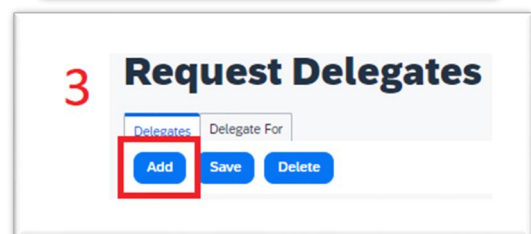
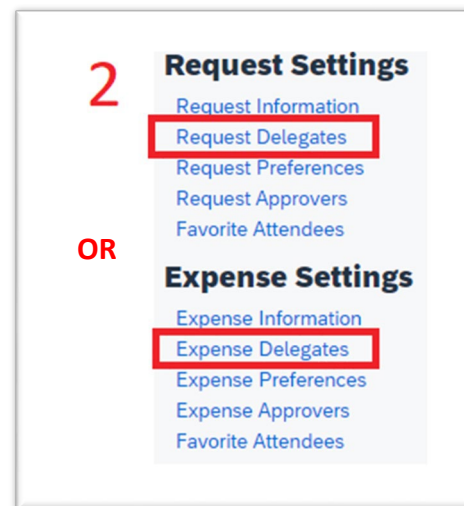
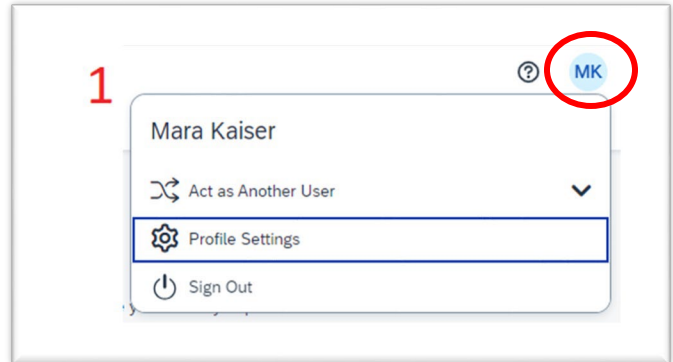
How to add a delegate and act as a delegate

A delegate can be added to Concur to help you with travel arrangements. Delegates can also create requests and setup expense reports; **delegates cannot submit final expense reports**. Supervisors in PHR and fiscal officers in the Financial System can assign delegates to approve on their behalf only if the delegate is a supervisor or financial officer themselves.

Screenshots are provided to use as visual guides for certain steps.

How to add a delegate in Concur

1. Click on **your initials in the circle** at the top-right, and then click **Profile Settings**.
2. Click on **Request Delegates** or **Expense Delegates** on the left hand side. For UMD, these 2 options are the same thing so you can click on either one. Regardless of which type is chosen, the delegate will be able to create both requests and expense reports.
3. Click **Add**. A search bar will appear.
 - a. You can search for the person you want to assign as a delegate.
 - b. Click **Add** next to the search bar to add the delegate.
4. Select the action options you want available for your delegate.
 - a. When you are finished, click **Save**.

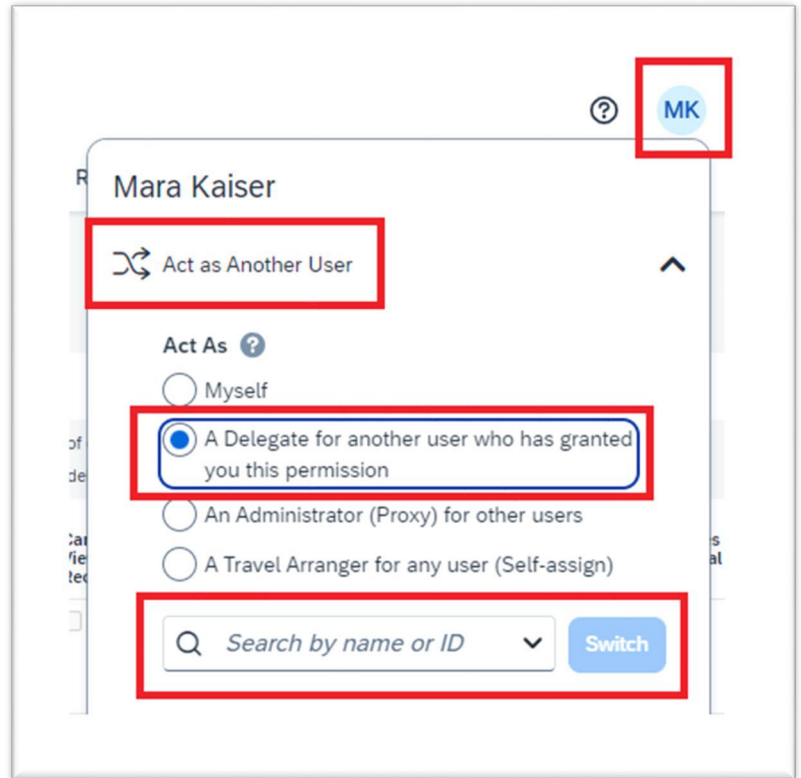


4	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Sweetman, Kelsey kbsweet@umd.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

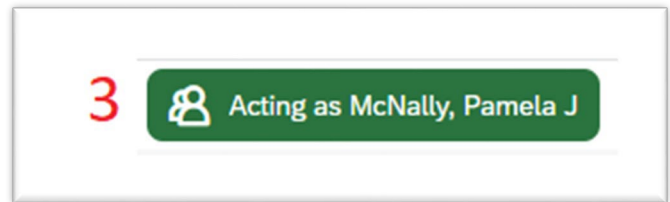
How to act as someone's delegate in Concur

Acting as a delegate is a temporary status in Concur. You must enable it each time you act for someone else.

1. Click **on your initials in the circle** at the top-right.
2. Make sure Act As: **A Delegate for another user who has granted you this permission** is selected. If someone has added you as their delegate, search for them in the search bar.
 - a. Click on their name.
 - b. Click **Switch**



3. You are now acting as a delegate for another employee.*
 - You can confirm you are acting as a delegate by looking at the top-right where your **Profile** button is located.
 - Or, you can look at the header under the UMD logo to confirm.



*If you are creating an expense report as a delegate, you are not able to submit the report once it is completed. The traveling employee you are acting on behalf of must **Submit** the FINAL expense report.

- Nevertheless, the system will allow you to click the **Submit** button to check your entries. Once you do that you will be shown any errors you may have that need to be corrected. UMD recommends you do that as a delegate. This action as a delegate will not submit the report. Once you have made corrections, notify the person the profile belongs to for them to Submit the report.