

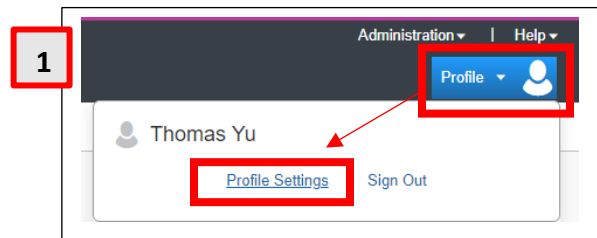
How to add a delegate and act as a delegate

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.

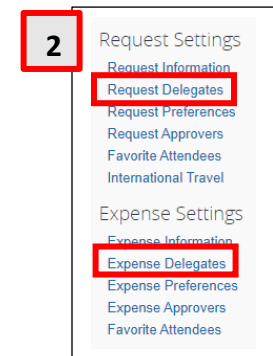
How to add a delegate in Concur

1. Click **Profile** at the top-right, and then click **Profile Settings**.

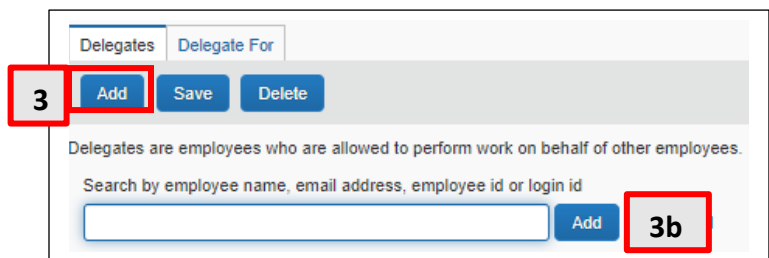


2. Click on **Request Delegates** or **Expense Delegates** on the left hand side. For UMES, these 2 options are the same thing so you can click on either one.

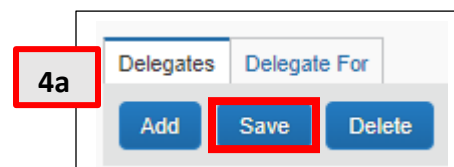
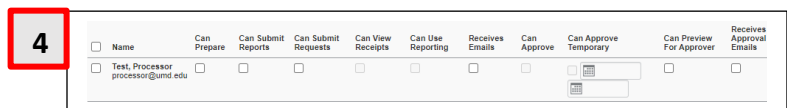
- Regardless of which Delegate type is chosen, the delegate will be able to create both requests and expense reports.



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.



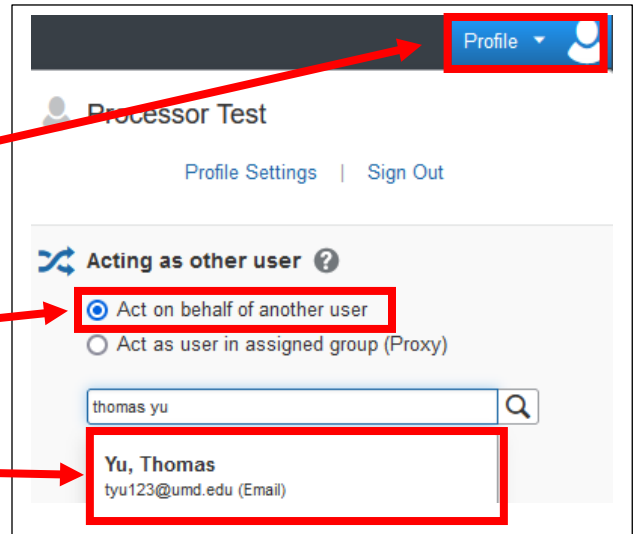
4. Select the action options you want available for your delegate.
 - a. When you are finished, click **Save**.



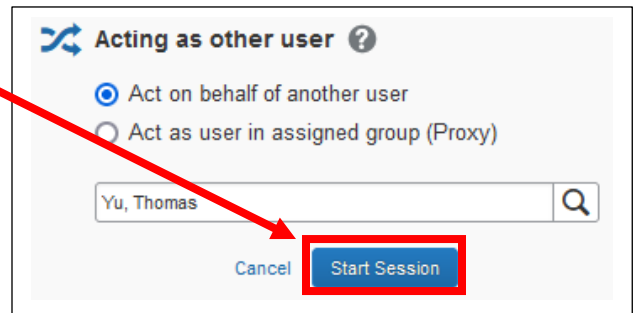
How to act as someone's delegate in Concur

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

1. Click on **Profile** at the top-right.
2. Make sure **Act on behalf of another user** is selected. If someone has added you as their delegate, search for them in the search bar.
 - a. Click on their name.
 - b. Click **Start Session**.



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, as a way to check your entries UMES recommends you, as a delegate, click **Submit** for an expense report. Doing this will allow Concur to alert you of issues to be corrected. Your action as a delegate will not submit the report.

