You can name colleagues to act on your behalf in Concur for the following purposes:

- **Prepare Requests or Expense Reports** You can specify Delegates that can prepare Requests and Reports on your behalf. You will be required to submit the Requests or Reports for approval.
- Approve Requests or Expense Reports If you are an Approver, you can name colleagues to approve Requests or Reports on your behalf for a specified period of time. Your colleague must also be setup as an Approver in order for you to add them as an Approver Delegate.
- **Preview Requests and Expense Reports** If you are an Approver, you can specify colleagues to view Reports or Requests submitted for your approval but who cannot approve on your behalf.
- Arrange Travel If you have access to Concur Travel, you can specify a colleague that can arrange and book travel on your behalf.

Logging in to Concur and Accessing Delegate Settings

1. <u>Access Concur from the Columbia Travel and Expense Website.</u>

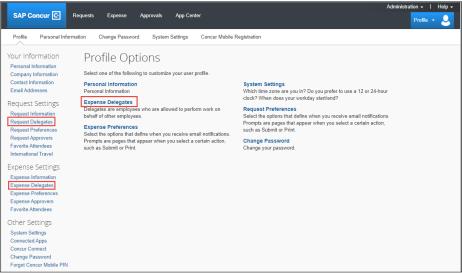


2. Enter your UNI and Password and click Login. Your Concur dashboard appears.

SAP Concur C Requests Expense Approvals App Center Profile -	
	2
COLUMBIA UNIVERSITY Hello, Eric Hello, Eric	
COMPANY NOTES Search by name or ID	
Columbia University Travel and Expense	

3. Click **Profile** on the top right of your screen.

4. Click **Profile Settings**.



5. Can click **Expense Delegates** (from *Profile Options* or *Expense Settings*) or **Request Delegates**. Delegates functionality and lists are the same in all places.



Columbia University Finance Training

Job Aid: Managing Delegates

Adding Delegates

Delegates	Delegate F	For									
Add	Add Save Delete										
Delegates a	elegates are employees who are allowed to perform work on behalf of other employees.										
You may as	sign a tempo	rary approver for a r	maximum of 365 day	s.							
Expense an	d Request sh	nare delegates. By a	ssigning permissions	to a delegate, you	are assigning peri	missions for Expe	inse and Request.				
Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails		

- 1. Click Add.
- 2. Type your Search using last name, UNI, email, etc. A list of matches appears.

Search by employee name, email address, employee id or l	login id
Sheer <mark>an, Kate</mark>	Add
Sheeran, Kate User ID: ks2070 € Logon ID: ks2070@columbia.edu	

- 3. Select the desired match or click the Add button next to the search field if your selection is not added.
- 4. Select the appropriate **checkboxes** to assign the permissions you wish to give the delegate. See the sections below for more details.
- 5. Click Save.

Preparer Delegates

You can assign Delegates to prepare Requests and Reports on your behalf. You can select *Can Click Submit* so that your Delegate can check for accuracy and completeness, but the Delegate cannot actually submit Requests and Reports for approval. You will receive notification when the Request or Report is ready to review and submit.

gates Delegat	te For									
Add Save Delete										
Delegates are employees who are allowed to perform work on behalf of other employees.										
You may assign a temporary approver for a maximum of 365 days.										
se and Reques	t share dele	egates. By assigni	ng permissions to a	a delegate, you a	re assigning pern	nissions for Exp	ense and Request.			
Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails	
Carballo, Kristine		✓	✓	×		v				
	Id Save ates are employ ay assign a tem se and Request Name Carballo,	Id Save Delete ates are employees who at ay assign a temporary app se and Request share dele Name Can Prepare Carballo,	Id Save Delete ates are employees who are allowed to perfor ay assign a temporary approver for a maxim se and Request share delegates. By assigni Name Can Prepare Can Submit Reports Carballo, Image: Carballo,	Id Save Delete ates are employees who are allowed to perform work on behalf ay assign a temporary approver for a maximum of 365 days. se and Request share delegates. By assigning permissions to a Name Can Can Submit Requests Name Can Submit Requests Carballo, P P	Id Save Delete ates are employees who are allowed to perform work on behalf of other employe ay assign a temporary approver for a maximum of 365 days. se and Request share delegates. By assigning permissions to a delegate, you a Name Can Can Submit Prepare Reports Requests Receipts Carballo, Image: Carballo,	Id Save Detete ates are employees who are allowed to perform work on behalf of other employees. ay assign a temporary approver for a maximum of 365 days. se and Request share delegates. By assigning permissions to a delegate, you are assigning permissions to a delegate, you are assigning permissions to a delegate. You are assigning permissions to assign the assign to a delegate. You are assign are assign to a delegate. You are assign are a	Id Save Delete ates are employees who are allowed to perform work on behalf of other employees. ay assign a temporary approver for a maximum of 365 days. se and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Exp Name Can Prepare Reportis Requests Receipts Reportis Receipts Receipts Reporting Carballo, Image: Carballo, Image: Carba	Id Save Delete ates are employees who are allowed to perform work on behalf of other employees. ay assign a temporary approver for a maximum of 365 days. se and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request. Name Can Submit Can Submit Can View Can Use Receives Name Prepare Reports Receipts Receipts Can Approve Temporary Carballo, Image: Carballo and C	Manual Canallo, Kristine Can Submit Can Submit <th< td=""></th<>	

- **Can Prepare** -The Delegate may prepare Expense Reports and Requests on your behalf. You will still be required to submit the Report for approval.
- **Can Submit Reports** The Preparer Delegate is able to click Submit Report once they have finished preparing your Expense Report. However, a Preparer Delegate cannot submit the Expense Report into workflow for approval. Two things will happen: 1) your Delegate will see any audit alerts that may prompt them to check for accuracy and completeness; 2) you will receive an email notification that your Delegate has created an Expense Report which should be ready for review and submission. You will need to open the Report created on your behalf and click Submit Report to enter it into workflow for approval.

If you do not authorize your Delegate to Submit Reports, they will not see the Submit Report button. Instead, the Delegate will see the Ready For Review button once they have finished preparing your Expense Report. When clicked, an email will be sent alerting you that your Expense Report is ready for review and the report status will change to Ready for Review. You must review the Report for accuracy and completeness prior to submitting it into workflow for approval.

- **Can Submit Requests** The Preparer Delegate is able to click Submit Request once they have finished preparing your Request. This works the same as Can Submit Reports. See details above.
- **Can View Receipts** Defaulted when selecting Can Prepare. This allows the Delegate to view your receipt store, receipts images, etc.
- Receives Emails The Delegate will be copied on all emails generated by Concur addressed to you

Columbia University Finance Training

Job Aid: Managing Delegates

Approver Delegates

If you are an Approver, you can name a colleague to approve Requests or Reports on your behalf. Your colleague must also be setup as an Approver in order for you to add them as an Approver Delegate.

Del	egates Del	egate For								
A	Add Save Delete									
	Delegates are employees who are allowed to perform work on behalf of other employees. You may assign a temporary approver for a maximum of 365 days. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.									
Expe			lelegates. By ass			u are assigning pe	ermissions for E	pense and Request.		
Expe			lelegates. By ass Can Submit Reports			u are assigning pe Can Use Reporting	ermissions for E Receives Emails	xpense and Request. Can Approve Temporary	Can Preview For Approver	Receives Approval Emails

- Can Approve Temporary If you are an Approver, the Delegate may approve Reports and Requests on your behalf. Indicate the date range you are giving this Delegate to approve reports and requests on your behalf. The Delegate must also be setup in Concur as an Approver
- **Can Preview for Approver** If selected on its own, the Delegate can view Reports and Requests submitted to you for approval but cannot Approve on your behalf
- Receives Approval Emails The Delegate will be copied on all emails generated by Concur notifying you of requests and reports pending your approval

Preview Delegates

If you are an Approver, you can specify colleagues to view Reports or Requests submitted for your approval but who cannot approve on your behalf.

Del	egates Dele	egate For									
A	dd Save	e Delet	e								
Deleg	Delegates are employees who are allowed to perform work on behalf of other employees.										
You n	You may assign a temporary approver for a maximum of 365 days.										
Expe	Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.										
				21		are accigning per		pense and request.			
	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails	

• Can Preview for Approver – If selected on its own, the Delegate can view Reports or Requests submitted to you for approval but cannot Approve on your behalf

Travel Delegates

If you have Concur Travel you can designate Travel Delegates who are allowed to book travel on behalf of other employees by selecting the option to select **Can Book Travel**. If you select Can Book Travel, Can Prepare and Can View Receipts will be automatically selected. As a result, a Travel Delegate is also assigned as an Expense Preparer Delegate.

Delega	tes are employ	ees who are a	allowed to pe	form work on be	shalf of other em	ployees.					
ou ma	y assign a tem	porary approv	ver for a maxi	mum of 365 day	15.						
Expens	e and Request	share delega	ites. By assig	ning permission	s to a delegate,	you are assigni	ing permissions	for Expense a	nd Request.		
		Can	Can Book	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
Nam	e	Prepare	Travel	Reports	incluence	100000000000					1.5 C

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Job Aid: Managing Delegates

Acting as a Delegate

You can be designated by your colleagues as a Delegate that can act on their behalf to prepare Requests, Expense Reports or act as a Travel Assistant. If you have a role as an Approver, you can be designated as an Approver Delegate by a colleague with an Approver role. Please note that you cannot use the Concur Mobile App when acting as Delegate and must use the Concur Desktop Application.

Viewing Colleagues for Whom You Are a Delegate and Permissions

To view who has designated you as their Delegate and your permissions:

Click the **Delegate For** tab:

	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
You may assign a temporary approver for a maximum of 365 days. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.								e and Request.		
This employee may act as a delegate for the listed employees.										
D	elete									
Jele	egates Delegate For									

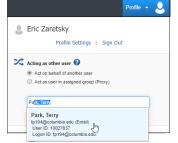
If you want to remove yourself as a Delegate:

Click the checkbox next the colleague's name and click the **Delete** button.

Acting on Behalf of a Colleague

If you are designated as a Delegate, you can select to act on behalf of that colleague for the tasks which you have been permissioned.

1. <u>Click **Profile** on the top right of your screen</u>.



- 2. Select Act on behalf of another user.
- 3. Search by name of ID of the colleague. Only those names that have given you Delegate access will appear.
- 4. Select the matching name.
- 5. Click Start Session.

Ending Your Delegate Session

After completing your work as your colleague, end the session to return your own Concur session.

1. Click Acting as on the top right of your screen.



- 2. Click Done acting for others.
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Job Aid: Managing Delegates

Submitting Requests or Reports Prepared by Your Delegate

Your Delegate can prepare, but cannot submit, Requests or Expense Reports on your behalf. When the Delegate finishes preparing your Request or Report, you will receive an Email notifying you that your Request or Report is ready for you to review and submit. You must open the Request or Expense Report to review the details. Clicking Submit for the Request or Expense Report is equivalent to your signature approving the contents prepared by the Delegate.

- 1. Log into Concur.
- 2. Navigate to the **Requests** or **Expense** modules to access the relevant Request or Expense Report.

Business Meal	
\$200.00	
Ready For Review	

- 3. Open the **Request** or **Expense Report** prepared by your Delegate and review the details that were entered.
- 4. Click Submit. This equivalent to your signature approving the details.

Getting Help

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now <u>https://columbia.service-now.com</u>