

SAP Concur Setting Up & Acting as a Delegate

SAP Concur



SAP Concur
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PCI Setting Up & Acting as a Delegate



Table of Contents

Welcome to SAP Concur	3
To access your Profile page.....	4
Concur Delegate Setup	5
Acting as a Delegate.....	7



PCI Setting Up & Acting as a Delegate

Welcome to SAP Concur

SAP Concur integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools you need to book travel as well as create and submit expense reports

Signing In to SAP Concur

1. Log in to www.pci-ctp.com
2. Select **Login to CONCUR**
3. You will be taken to the Concur home page.
4. On the **Sign In** screen, enter your **User Name** and **Password**.

Username is your work email address and **Password** is what you use to log into your work computer.

5. Click **Sign In**.



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To access your Profile page

1. Click **Profile > Profile Settings**.

The screenshot shows the SAP Concur user interface. At the top, there's a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', and 'App Center'. On the right, there's a user profile dropdown showing 'William Nate Never' with a 'Profile' link. Below the navigation bar, the 'Profile' tab is selected, showing 'Your Information' on the left and 'Profile Options' on the right. The 'Profile Options' section includes links for 'Personal Information', 'Company Information', 'Credit Card Information', and 'E-Receipt Activation'. A 'Acting as other user' dialog box is open on the right, prompting the user to search by name or ID.

2. On the **Profile Options** page, review your information, and select the appropriate links to update your profile information.

The screenshot shows the 'Profile Options' page in SAP Concur. The 'Profile' tab is selected, and the 'Profile Options' section is highlighted with a red box. The left sidebar shows 'Your Information' and 'Travel Settings' categories. The main content area lists various settings: 'Personal Information', 'Company Information', 'Credit Card Information', 'Travel Profile Options', 'Bank Information', 'Request Preferences', 'Change Password', 'System Settings', 'Contact Information', 'E-Receipt Activation', 'Travel Vacation Reassignment', 'Expense Delegates', 'Expense Preferences', and 'Mobile Registration'. Each setting has a brief description of its function.



PCI Setting Up & Acting as a Delegate

Concur Delegate Setup

Once in Profile Settings, select **Request Settings** -> **Request Delegates** located on the left hand column.

The screenshot shows the SAP Concur user interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The left sidebar lists various settings categories: 'Your Information', 'Request Settings', and 'Expense Settings'. Under 'Request Settings', 'Request Delegates' is highlighted with a red circle. The main content area is titled 'Profile Options' and contains several sections: 'Personal Information', 'E-Receipt Activation', 'Request Preferences', 'Change Password', 'System Settings', 'Expense Delegates', 'Expense Preferences', and 'Concur Mobile Registration'. Each section provides a brief description of its function.

Click Add and type employee information that will be acting as your delegate.

The screenshot shows the 'Request Delegates' page in SAP Concur. The left sidebar is the same as the previous screenshot, but 'Request Delegates' is now selected. The main content area is titled 'Request Delegates' and includes a search bar, an 'Add' button, and a list of delegates. The search bar contains the text 'LISA COLLINS'. The list of delegates includes the following information:

Name	Email	Employee ID	Logon ID
LISA COLLINS	lcollins@pci-nsn.gov	101256	lcollins@pci-nsn.gov
LISA ECHOLS	lechols@pci-nsn.gov	100147	lechols@pci-nsn.gov
LISA GARRETT	lgarrett@pci-nsn.gov	100351	lgarrett@pci-nsn.gov
LINDA JONES	ljones@pci-nsn.gov	100598	ljones@pci-nsn.gov
LINAM, JOSEPH	ljinam@pci-nsn.gov		



PCI Setting Up & Acting as a Delegate

Select the permissions for delegate selected.

Request Delegates

Delegates

Delegate For

Add

Save

Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	COLLINS, LISA lcollins@pci-nsn.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div><input type="checkbox"/><div></div></div> <div><input type="checkbox"/><div></div></div>	<input type="checkbox"/>

Once this step is complete the delegate will be able to login to their account and select “Act on behalf of another user”.



PCI Setting Up & Acting as a Delegate

Acting as a Delegate

If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing and submitting reports.

To work as a delegate

1. Click **Profile > Act on behalf of another user**.
2. Select the appropriate user's name.
3. Click **Start Session**.

Note: The **Profile** menu now displays **Acting as** and shows the name you just selected.

You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.

4. To select a different user, follow the same steps but select a different name.
5. To return to your own tasks, click **Acting as**, and then click **Done acting for others**.

Note: The **Profile** menu now appears.

Sue Peterson

[Profile Settings](#) | [Sign Out](#)

Acting as other user ?

☒ Act on behalf of another user

☐ Act as user in assigned group (Proxy)

☐ Book travel for any user (Self-assign)

Choose a user

[Cancel](#) [Start Session](#)

Help ▾

Acting as
Never, William N ▾

Currently acting as
Never, William N

[Profile Settings](#) | [Sign Out](#)

Acting as other user ?

☒ Act on behalf of another user

☐ Act as user in assigned group (Proxy)

☐ Book travel for any user (Self-assign)

Choose a user ▾

[Cancel](#) [Start Session](#)

[Done acting for others](#)