SAP Concur Setting Up & Acting as a Delegate

SAP Concur C.





SAP Concur Version 1.7

July 19, 2018

Modified for the Poarch Band of Creek Indians October 1, 2019



Table of Contents

Welcome to SAP Concur	3
To access your Profile page	4
Company Delegate Cotany	
Concur Delegate Setup	
Acting as a Delegate	



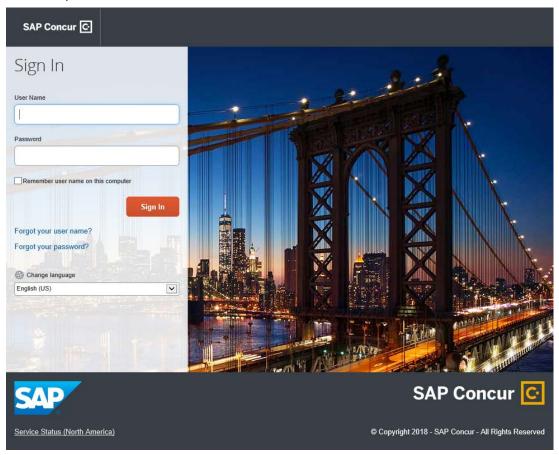
Welcome to SAP Concur

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 <u>www.pci-ctp.com</u>
- 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.

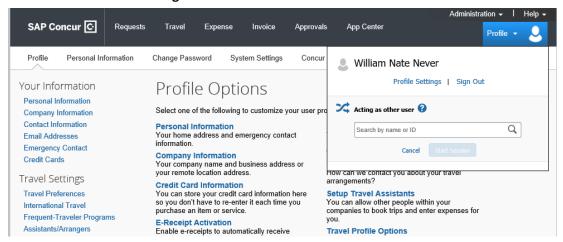


5. Click Sign In.

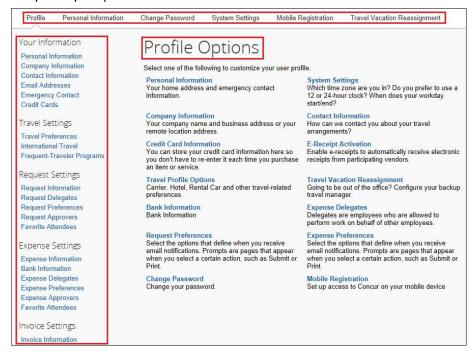


To access your Profile page

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



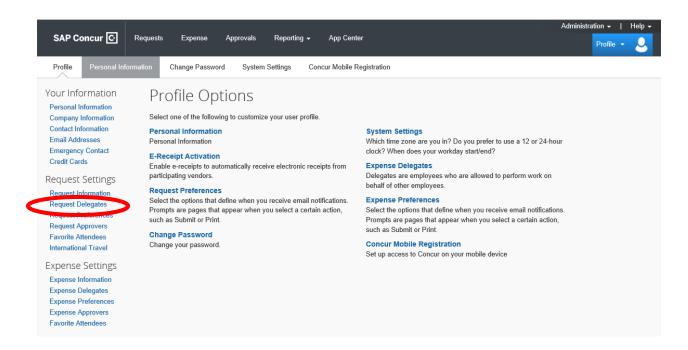
2. On the **Profile Options** page, review your information, and select the appropriate links to update your profile information.



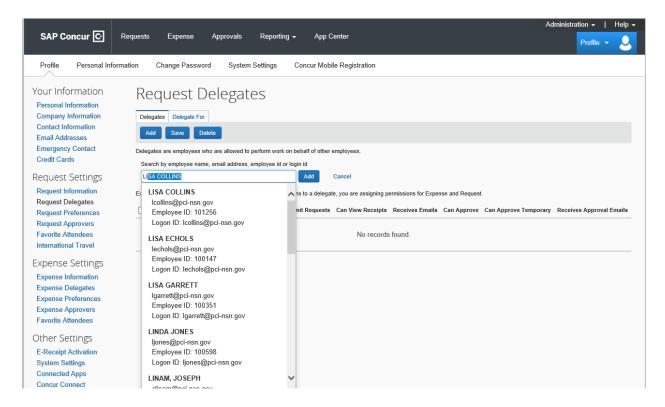


Concur Delegate Setup

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

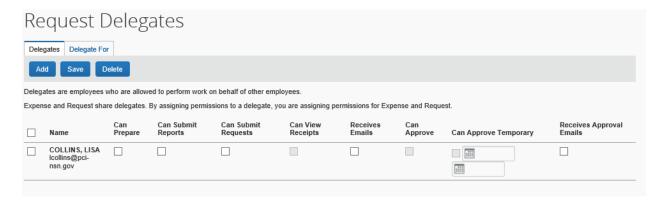


Click Add and type employee information that will be acting as your delegate.





Select the permissions for delegate selected.



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



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.

