

Concur for Executive Admins

Expense Delegate/Travel Assistant

Expense Delegates

Acting as an Expense Delegate works exactly like doing your own Expense Report. Once you are listed as an Expense Delegate on your manager's account, you will have a choice of acting on your own behalf or the behalf of your manager.

Initial Setup

On the **Manager's account** you need to be added as an Expense Delegate:

1. Go to the Profile tab
2. Select the Expense Delegates command
3. Press the Add Delegate button
4. Search for the Employee by name and press Add
5. Select the options for that Delegate

The screenshot displays the Concur web application interface. The top navigation bar includes 'My Concur', 'Travel', 'Expense', 'Reporting', 'Administration', and 'Profile' (highlighted with a blue box and callout 1). Below the navigation bar, there are links for 'Personal Information', 'Change Password', 'System Settings', 'Mobile Registration', and 'Travel Vacation Reassignment'.

The left sidebar shows 'My Profile' with sections for 'Your Information', 'Travel Settings', 'Expense Settings', and 'Other Settings'. The 'Expense Settings' section is expanded, and 'Expense Delegates' is highlighted with a blue box and callout 2.

The main content area shows the 'Expense Delegates' section. It includes an 'Add Delegate' button (callout 3), 'Save', and 'Delete' buttons. Below this is a search bar with the text 'Search by employee name, email address, employee id or logon id' and an 'Add' button (callout 4). A table of delegates is shown below, with columns for 'Name', 'Can Prepare', 'Can Submit', 'Can View Receipts', and 'Receives Emails'. The first row shows 'User2, Ralph' with 'user2@teamhealth.com' as the email address. The 'Can Prepare', 'Can Submit', and 'Can View Receipts' checkboxes are checked, while 'Receives Emails' is unchecked. This row is highlighted with a blue box and callout 5.

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Your Account

On your account, you will notice a new option at the top left of the screen that indicates whether you are accessing your account or your manager's account.

NOTE: if you were logged into your account when you were made a delegate for your manager, you will have to log out and log back in to see the account option below.

Administering Multiple Accounts

To switch accounts, choose "me" or your manager's name from the drop down list.



The Expense screen will look and work identically as if you were doing your own expenses, but now you are working with your Manager's Expenses.

PLEASE pay attention to the account that you are administering for so that you don't create reports for the wrong account.

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Travel Assistant

If your manager travels, you may also act as the Travel Assistant for your manager. The process is similar to the Expense Delegate, but **this is a separate setting.**

Initial Setup

On your Manager's Account:

1. Go to the Personal Information page on the Profile tab
2. Scroll down to the Assistants and Travel Arrangers section
3. Select Add and Assistant
4. Type in the Employee's name and press Search
5. Choose the Employee from the drop down results
6. Select the options for this Employee
7. Save the settings

The screenshot shows the 'Add an Assistant' dialog box in a Google Chrome browser window. The dialog box is titled 'Add an Assistant' and contains the following elements:

- Search Criteria:** A text input field containing 'user'.
- Search What:** A dropdown menu set to 'Name, E-Mail, Log-in'.
- Search:** A button to execute the search.
- Assistant:** A dropdown menu showing 'User2, Ralph Sample (user2@teamhealth.com)'.
- Options:** Two checked checkboxes: 'Can book travel for me' and 'Is my primary assistant for travel'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom of the dialog.

The background page is the 'Assistants and Travel Arrangers' section of a user profile. It includes a 'Refuse Self Assigning Assistants' checkbox and a '+ Add an Assistant' button. The page also displays 'TSA Secure Flight' and 'International Travel' sections.

Acting as a Travel Arranger is the same process as the Expense Delegate, change the account that you are administering for on the top left of the Concur page.