

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 shows the Concur web interface. The 'Profile' tab is selected in the top navigation bar (1). The 'Expense Delegates' option is highlighted in the left sidebar (2). The 'Add Delegate' button is highlighted (3). A search bar is highlighted (4) with the text 'User2, Ralph' and 'user2@teamhealth.com'. The table below shows the delegate's permissions (5):

Name	Can Prepare	Can Submit	Can View Receipts	Receives Emails
User2, Ralph user2@teamhealth.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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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

TSA Secure Flight
The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.

Gender **[Required]** Date of Birth (mm/dd/yyyy)
 Male Female

International Travel
Adding your passport information to your profile will allow you to make international travel a little easier.

Passport Nationality
 Passport Expiration (mm/dd/yyyy)

Assistants and Travel Arrangers
Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Search Criteria: user Search What: Name, E-Mail, Log-in Search

Assistant: User2, Ralph Sample (user2@teamhealth.com)

Can book travel for me
 Is my primary assistant for travel

*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.

Save Cancel

Go to top
+ Add an Assistant

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.