# User Guide – Assigning Expense Delegates and Travel Arrangers

Expense Delegates and Travel Arrangers are assigned separately. This user guide is intended to show how to assign an Expense Delegate and a Travel Arranger.

Assigning an Expense Delegate

Expense Delegates can perform the following: Prepare and/or submit travel expense reports, approve expense reports, and receive emails from SAP Concur. A traveler can have multiple Expense Delegates.

1. Sign into SAP Concur to access your home page. [Reference: SAP Concur User Guide – Signing In]

2. Select the **Profile icon** on your **Home Page** and select **Profile Settings**.
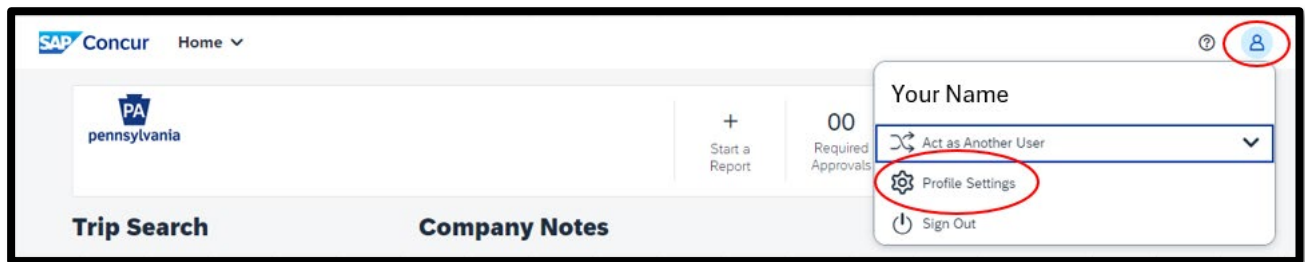
3. The **Profile Options** page is displayed. Click on **Expense Delegates**.
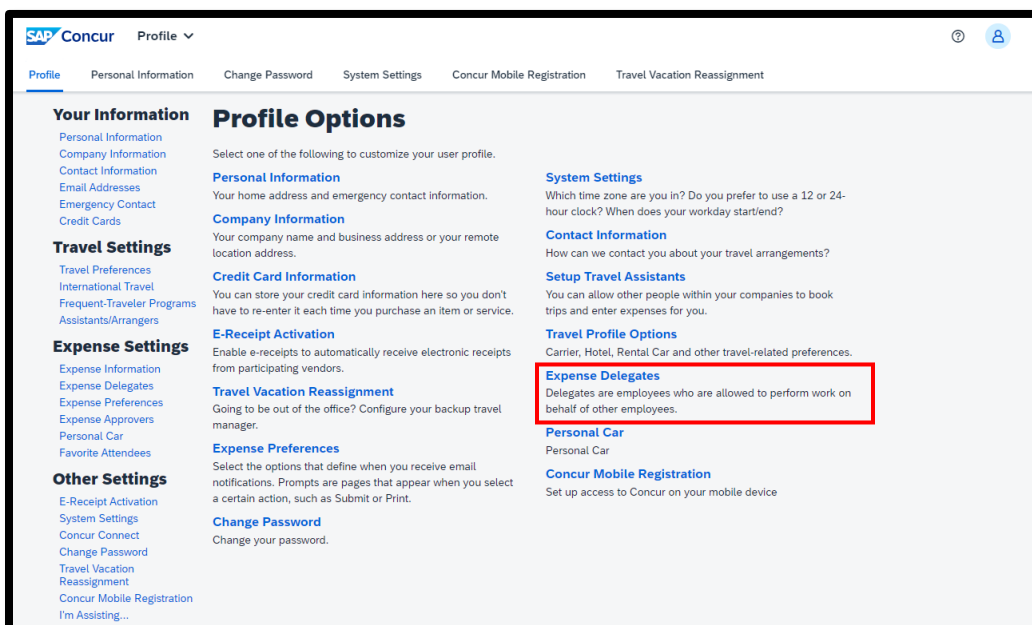
4. To add a delegate, click the **Add** button then use one of the search criteria, such as employee name or 8-digit employee ID. Select the delegate when they are displayed in the list. Select the permissions you want the delegate to have by clicking in the checkboxes under the permission description.

Expense Delegates

| Delegates | Delegate For |

Add **Save** **Delete**

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

	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
				No records found.				

5. Search for an employee by typing their name, email address, or 8-digit employee ID, including the leading zeros (i.e. 00999999) in the search box. Select the employee when displayed in the list and click the **Add** button.

Expense Delegates

| Delegates | Delegate For |

Add **Save** **Delete**

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

Search by employee name, email address, employee id or login id

[_____] **Add** Cancel

	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
				No records found.				

6. SAP Concur does not automatically provide an Expense Delegate with access, so you must grant permissions. Check the boxes for the functions you want your delegate to perform on your behalf. It is recommended that you select "Receives Emails" as this will automatically alert the delegate if the report is returned to you from your supervisor or BCPO Travel Audits.

Expense Delegates

| Delegates | Delegate For |

Add **Save** **Delete**

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

	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
	Never, William testtraveler@copa.gov	☑	☑	☑	☑	☐	☐ 📅 📅	☐

Below is a list of permission descriptions.

- **Can Prepare** – permits a delegate to prepare expense reports but not submit them.
- **Can Submit Reports** – permits a delegate to prepare and submit expense reports.
- **Can View Receipts** – permits a delegate to view the receipts stored and to add receipts to expense reports.
- **Receives Emails** – permits the system to send a copy of email notifications to the delegate, except approval emails.
- **Can Approve** – permits a delegate to approve workflow on your behalf. (Delegate must have the ESS Supervisor role to approve expense reports.)
- **Can Approve Temporary** – permits a delegate to approve workflow on your behalf for a temporary period of time. You must enter a start and end date for this permission. (Delegate must have the ESS Supervisor role to approve expense reports.)
- **Receives Approval Emails** – permits a delegate to receive a copy of approval email notifications. Email notifications will still be received by the Approver even though the approve permissions were assigned to a delegate.

When finished, click the **SAVE** button.

Deleting an Expense Delegate

To delete an Expense Delegate, check the box to the left of their name and click the **Delete** button.

Assigning a Travel Arranger

A Travel Arranger can view and modify your profile and can book travel on your behalf in SAP Concur. A traveler can have multiple travel arrangers. SAP Concur sometimes references a Travel Arranger as a Travel Assistant.

1. Sign into SAP Concur to access your home page. [Reference: SAP Concur User Guide – Signing In]

2. Select the **Profile icon** on your **Home Page** and select **Profile Settings**.

3. The **Profile Options** page is displayed. Click on **Setup Travel Assistants**.
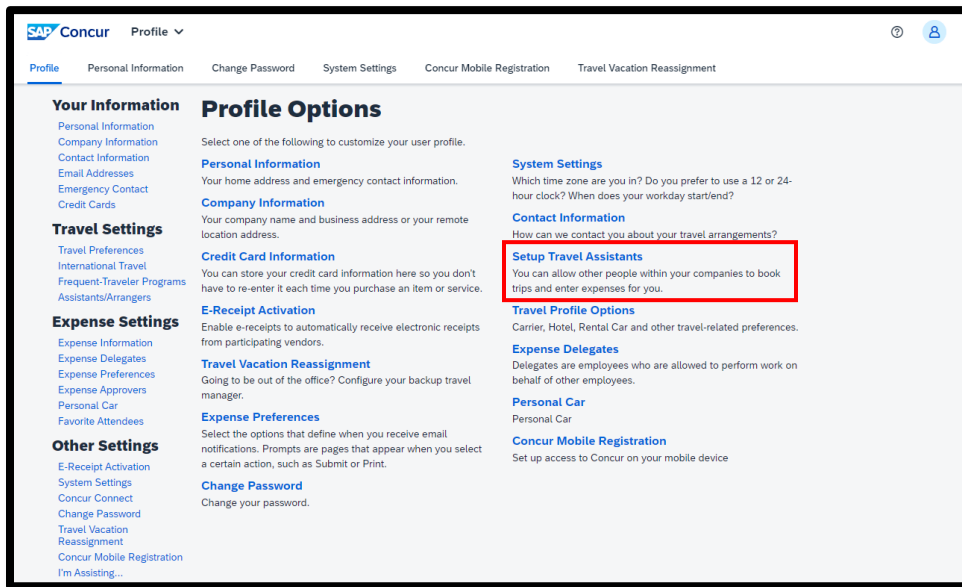
4. To add a Travel Arranger, click the **Add an Assistant** link.
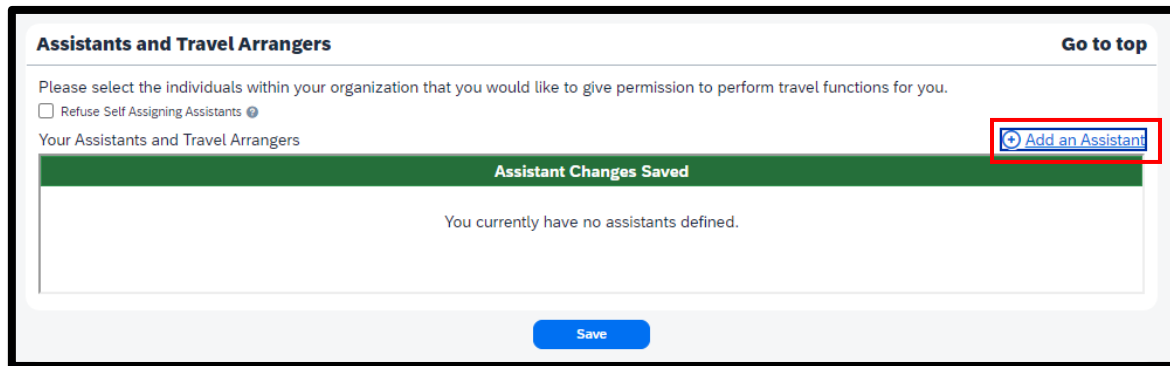
5. Search for an employee by typing their name, email address or 8-digit employee ID, including the leading zeros (i.e. 00999999) in the Assistant box. Select the employee when displayed in the list and select the **Can book travel for me checkbox**.
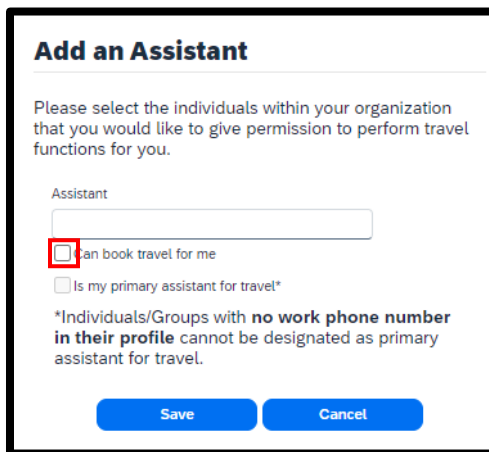
Click the **Save** button.

Deleting a Travel Arranger

To delete a Travel Arranger, click the **Trash Can** icon and click OK.

Assistants and Travel Arrangers   Go to top

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

☐ Refuse Self Assigning Assistants ❓

Your Assistants and Travel Arrangers   ⊕ Add an Assistant

Assistant Changes Saved		
Assistant	**Can book travel?**	**Update/Delete**
Never, Test Traveler	Can book travel? ✓	✏️ 🗑️

Save