

User Guide – Acting as an Expense Delegate or Travel Arranger

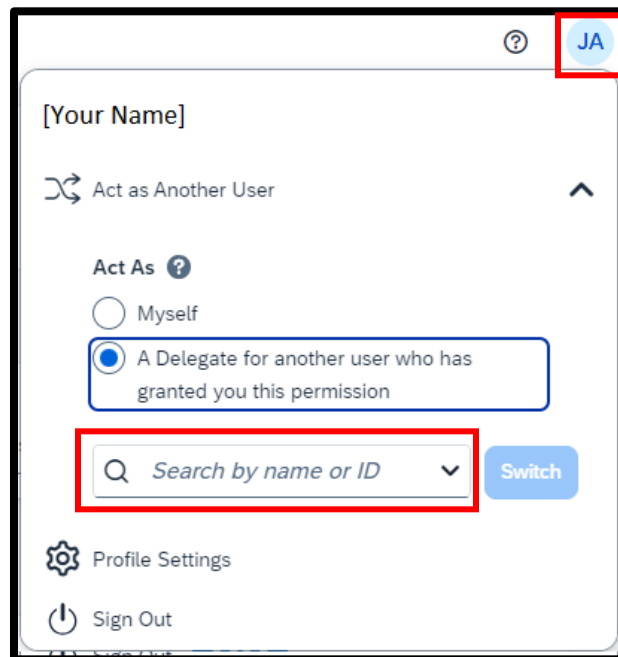
Expense Delegates are assigned to process expense reports, while Travel Arrangers are assigned to book travel. This user guide is intended to show how to perform tasks on behalf of another person.

Acting on behalf of Another User

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

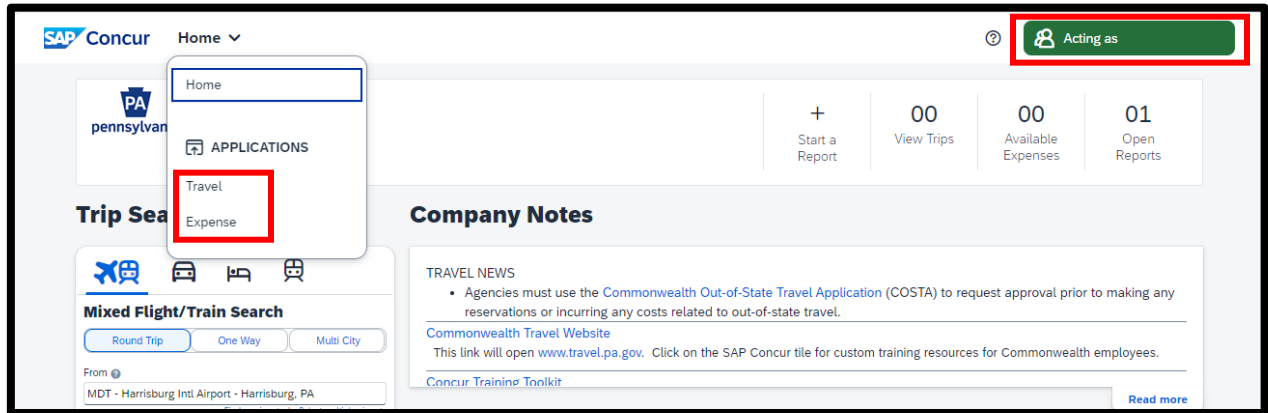
Important Note: Before you can act on another person’s behalf, they must assign you as their expense delegate and/or travel arranger. [Reference: SAP Concur User Guide: Assigning Expense Delegates and Travel Arrangers]

2. On the home page, click on the **Profile Button**. If you have been assigned as an expense delegate or travel arranger for someone, you will see the **Act As** section. Select the radio button next to **A Delegate for another user who has granted you this permission** and enter all or part of the traveler’s name or 8-digit employee ID number in the search field. Select the appropriate name from the list and then click the **Switch** button.



Note: You will only be able to locate those individuals who have identified you as their expense delegate and/or travel arranger.

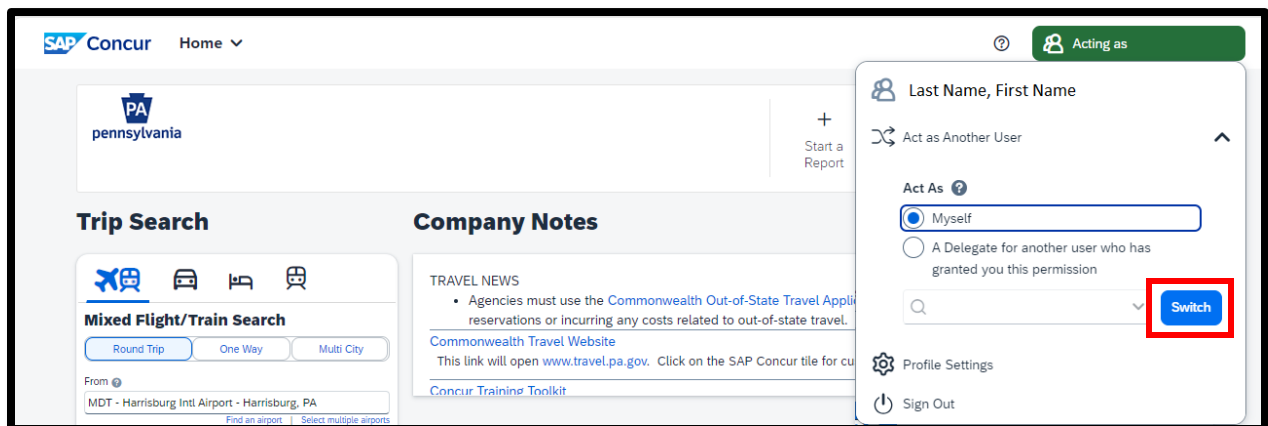
- You are now acting on behalf of another user and they will have determined your permissions. If you are an expense delegate, you can access **Expense** under the **Applications** sub-menu. If you are a travel arranger, you can access **Travel** under the **Applications** sub-menu. If you are both an expense delegate and a travel arranger, you can access both applications. On the SAP Concur home page, the profile dropdown box will display Acting as that user and will display their name. You will now be able to act on the traveler's behalf as if you were in your own profile.



Note: User Guides with instructions on how to book travel reservations and how to enter expense reports are available on the SAP Concur tile on the travel website at www.travel.pa.gov.

Finished Acting on behalf of another user

- To return to working as yourself, click the **Profile** dropdown button, select the radio button next to **Myself**, and click the **Switch** button.



You are now working as yourself.