

# Request & Expense Delegates

## What's the difference between a Travel Arranger and a Request/ Expense Delegate?

Request/Expense Delegate – This individual can create Travel Requests and Expense Reports on behalf of another employee.

Travel Arranger – This individual can make travel reservations for another employee or a guest traveler.

## How to Assign a Request or Expense Delegate:

Go to your Profile Settings.



The screenshot displays the SAP Concur user interface. At the top, there is a dark navigation bar with the SAP Concur logo on the left and menu items for 'Requests', 'Expense', 'App Center', and 'Profile' on the right. A red arrow points to the 'Profile' dropdown menu. Below this bar, the user's profile information is shown, including the CSU logo and 'The California State University' text. To the right of the profile information, there is a '+ New' button and a notification icon with the number '0'. Below the notification icon, the text 'Authori' and 'Requ' is visible. A red arrow points to the 'Profile Settings' link, which is highlighted with a blue box. To the right of 'Profile Settings' is a 'Sign Out' link.

Select "Expense Delegates."

# Profile Options

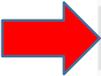
Select one of the following to customize your user profile.

- Personal Information**  
Personal Information
- Expense Delegates**   
Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- System Settings**  
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Request Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Personal Car**  
Personal Car

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.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
No records found.				

Type the first few letters of the last name of the employee you wish to be your delegate.

**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**

Expense and Request share delegates. By assigning permissions to a delegate,

<input type="checkbox"/>	Name	Can Prepare
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Select the permissions you want your delegate to have, and then click the Save button.

**Add** **Save** **Delete**

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

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input checked="" type="checkbox"/>	David, Sarah sarah.david@csus.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once the employee is selected and the permissions granted, the employee will be able to act on behalf of the traveler.

The delegate can now go their Profile Settings and click “Act on Behalf of another User.” Type the first few letters of the traveler’s last name and select. Click the Start Session button.

 Sarah E David

[Profile Settings](#) | [Sign Out](#)

 **Acting as other user** 

Act on behalf of another user

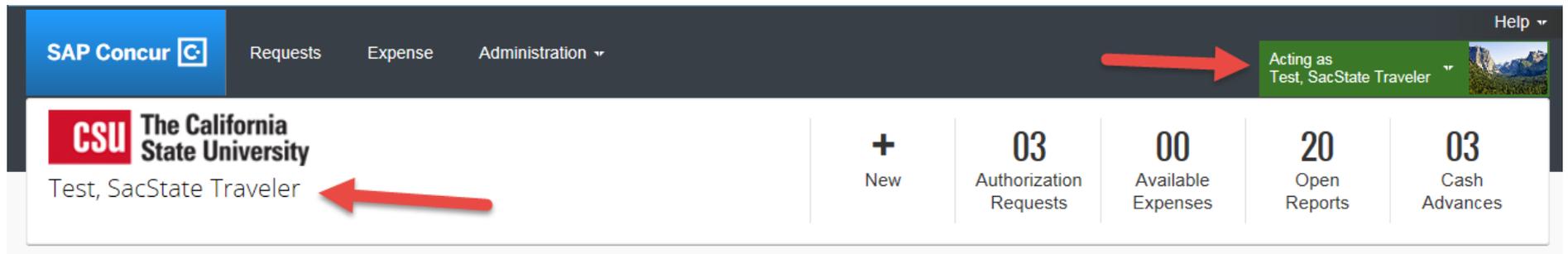
Act as user in assigned group (Proxy)

Test, SacState Traveler 

[Cancel](#)

[Start Session](#) 

The Delegate will now see that they are acting on behalf of the traveler, and can create a Travel Request or Expense Report on behalf of the traveler.



SAP Concur  [Requests](#) [Expense](#) [Administration](#)  [Help](#) 

**Acting as Test, SacState Traveler** 

 **The California State University**

Test, SacState Traveler 

**+**  
New

**03**  
Authorization Requests

**00**  
Available Expenses

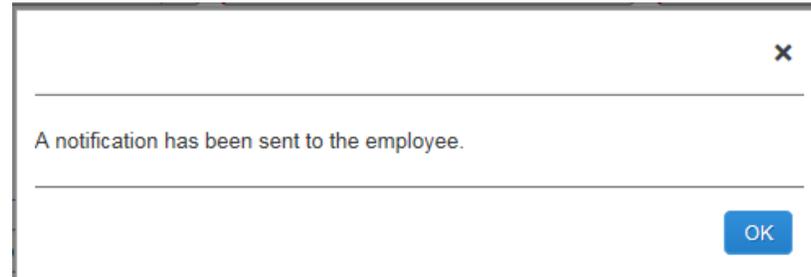
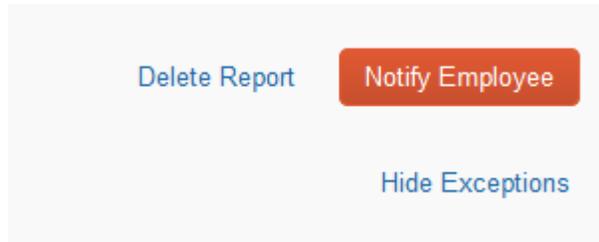
**20**  
Open Reports

**03**  
Cash Advances

 Currently acting as  
**Test, SacState Traveler**  
[Profile Settings](#) | [Sign Out](#)

## IMPORTANT:

Delegates can create Travel Requests and Expense Claims for travelers, however they **cannot** “Submit” the report for the traveler. When the delegate has completed a report, they must “Notify Employee.”



The traveler will receive a notice that their Travel Request or Expense Claim is ready for review. Once the traveler has reviewed the report, they must “Submit” the report themselves due to the certification agreement.

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Delegation Report	33Q6	Not Submitted
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## Final Review



### CSU Request Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate estimation of expenses that will be incurred to accomplish official business for CSU and this request is in compliance with CSU/Campus Travel Policy.
2. If I am driving a personal vehicle, I have taken the University Defensive Driving training (if applicable) and/or a current STD 261 (Authorization to use Privately Owned Vehicles on State Business) form is on file.

Accept & Submit

Cancel

Go back to Profile settings to end the delegate session and click Done acting for others.

Or enter another last name to delegate on behalf of another user.

Acting as  
Test, SacState Traveler

Currently acting as  
**Test, SacState Traveler**  
[Profile Settings](#) | [Sign Out](#)

**Acting as other user** ?

- Act on behalf of another user
- Act as user in assigned group (Proxy)

Choose a user

Cancel Start Session

**Done acting for others**