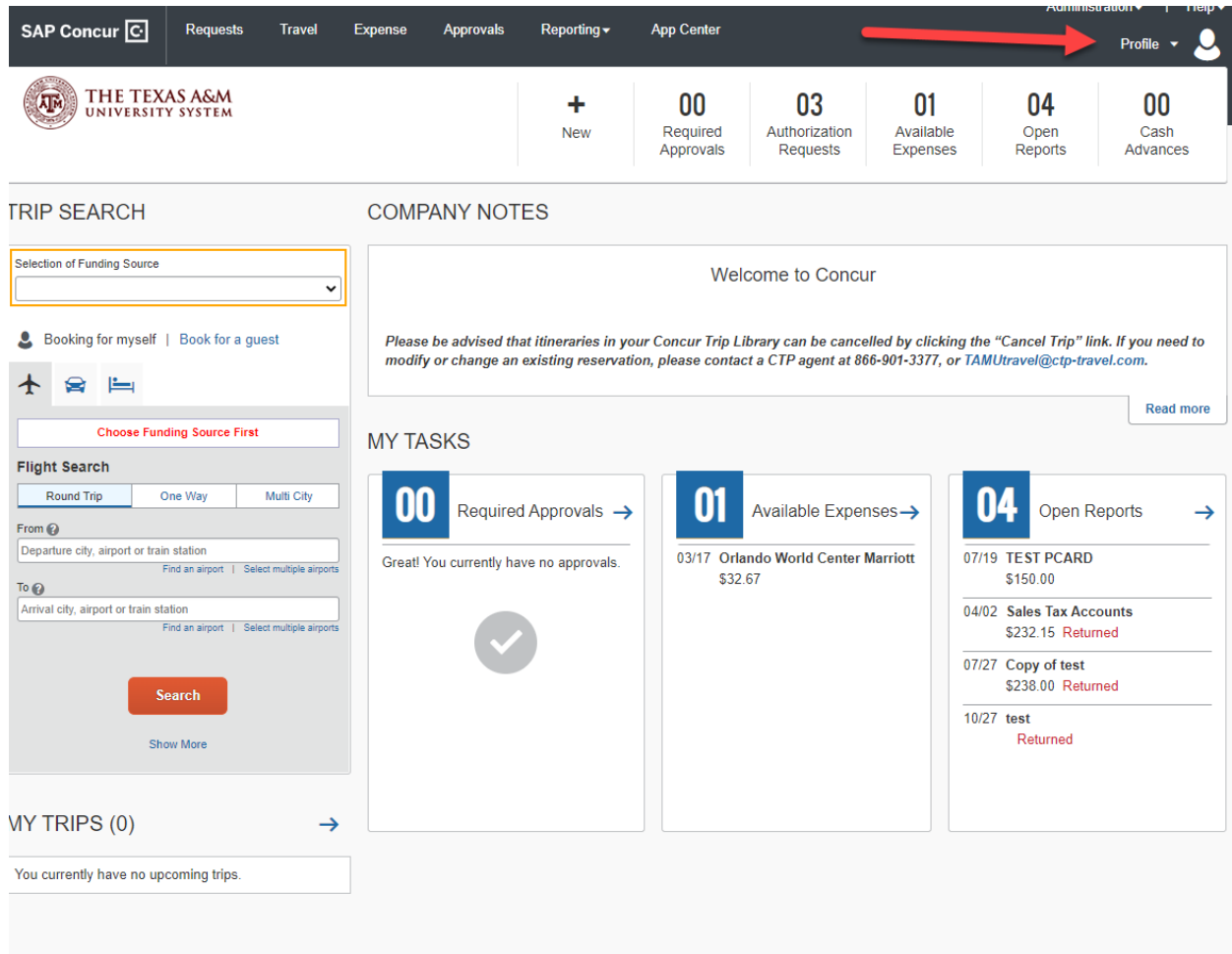


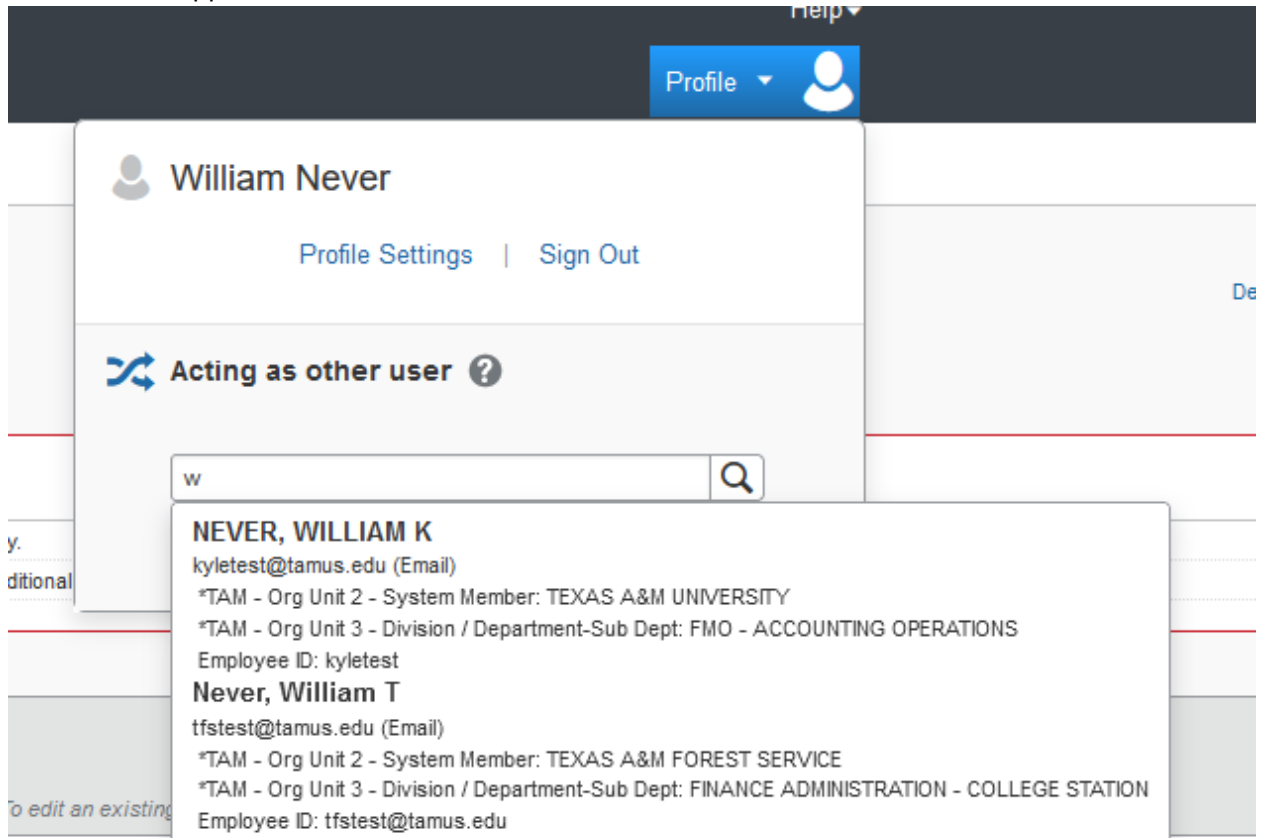
# Acting as a Delegate

1. On your home page, click on the profile icon at the top right-hand corner.

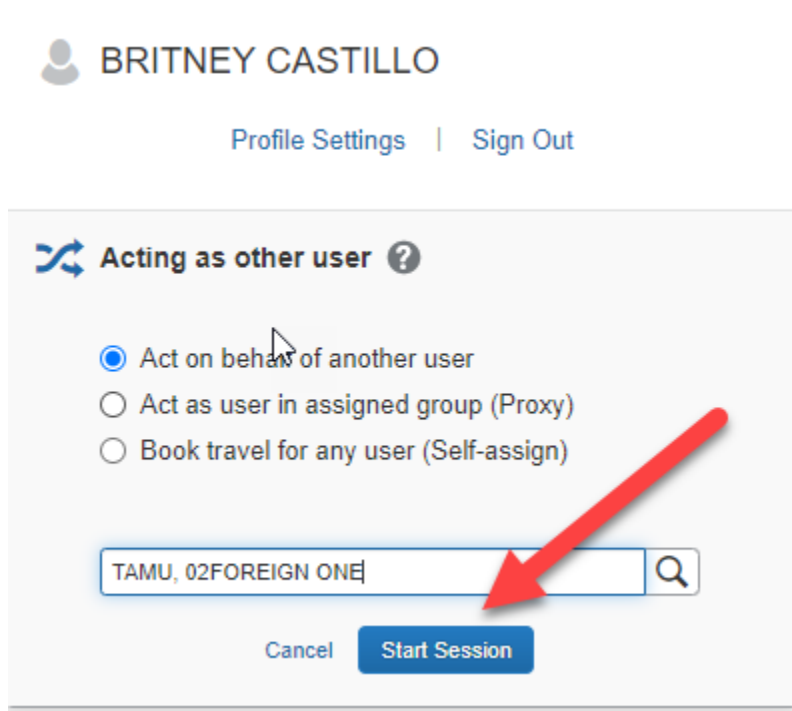


The screenshot shows the SAP Concur home page. At the top, there is a navigation bar with the SAP Concur logo and several menu items: Requests, Travel, Expense, Approvals, Reporting, and App Center. On the far right of this bar, there is a 'Profile' dropdown menu and a profile icon, which is highlighted by a red arrow. Below the navigation bar, there is a header section for 'THE TEXAS A&M UNIVERSITY SYSTEM' with a logo on the left and a summary of key metrics on the right: '+ New', '00 Required Approvals', '03 Authorization Requests', '01 Available Expenses', '04 Open Reports', and '00 Cash Advances'. The main content area is divided into three columns. The left column is titled 'TRIP SEARCH' and contains a 'Selection of Funding Source' dropdown menu, a 'Booking for myself | Book for a guest' toggle, and a 'Flight Search' section with fields for 'From' and 'To' (departure and arrival cities/airports) and a 'Search' button. The middle column is titled 'COMPANY NOTES' and contains a 'Welcome to Concur' message with a 'Read more' link. The right column is titled 'MY TASKS' and contains three task cards: '00 Required Approvals' (with a checkmark icon and the text 'Great! You currently have no approvals.'), '01 Available Expenses' (with a list of expenses including '03/17 Orlando World Center Marriott \$32.67'), and '04 Open Reports' (with a list of reports including '07/19 TEST PCARD \$150.00', '04/02 Sales Tax Accounts \$232.15 Returned', '07/27 Copy of test \$238.00 Returned', and '10/27 test Returned'). At the bottom left, there is a 'MY TRIPS (0)' section with a 'Show More' link and a message: 'You currently have no upcoming trips.'

2. Start Typing the name of the person's profile you would like to delegate into, and select the name when it appears.



3. Click Start Session



- The name in the top right-hand corner will change to the person you are delegating for and will turn green. This means you are no longer acting in your own profile. You can now go under any tab within their profile and perform business functions such as create a request/expense report, approve, and book travel.

The screenshot shows the SAP Concur Expense page. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', and 'Approvals'. The user is currently acting as 'NEVER, WILLIAM K'. Below the navigation bar, there are tabs for 'Manage Expenses', 'View Transactions', and 'Cash Advances'. The main content area is titled 'Manage Expenses' and 'ACTIVE REPORTS'. There are three report cards: 'Concur Demo 2.15' (RETURNED, 02/16/2022, \$1,730.02), '1234, 12352 August 2021' (RETURNED, 11/01/2021, \$2,041.36), and 'Dallas- Concur Fusion' (NOT SUBMITTED, 06/13/2022, \$629.57). A 'Create New Report' button is visible on the left.

- When you are done working in this person's profile. You will go back into the top right-hand corner click on the drop down and select done acting for others.

The screenshot shows the same SAP Concur Expense page as above, but with a dropdown menu open in the top right corner. The dropdown menu is titled 'Acting as other user' and contains a search bar for 'Search by name or ID', a 'Cancel' button, a 'Start Session' button, and a 'Done acting for others' button. A red arrow points to the 'Done acting for others' button. The background content is partially obscured by the dropdown menu.

6. You will then be directed back to your home page. There will no longer be someone else's name in the right-hand corner, so you are back in your own profile.

SAP Concur
Requests | Travel | Expense | Approvals | App Center

Profile

+  
New

03  
Required Approvals

01  
Authorization Requests

04  
Available Expenses

01  
Open Reports

00  
Cash Advances

### TRIP SEARCH

Selection of Funding Source

Booking for myself | [Book for a guest](#)

Choose Funding Source First

#### Flight Search

Round Trip
One Way
Multi City

From ?  
  
Departure city, airport or train station  
[Find an airport](#) | [Select multiple airports](#)

To ?  
  
Arrival city, airport or train station  
[Find an airport](#) | [Select multiple airports](#)

Search

[Show More](#)

### ALERTS

i As a Texas A&M University System employee, you are eligible for a free **Triplt Pro** subscription. [Learn More and Activate](#) Not right now

### COMPANY NOTES

## Welcome to Concur Travel for the Texas A&M Aggies!

For more information regarding eTravel please visit [System Offices eTravel Webpage](#)

To see a list of countries currently under a travel warning please visit [United States Department of State](#)

[Read more](#)

### MY TASKS

03

Required Approvals →

**WILLIAM N.** | Washington, DC-test  
 \$0.00 — Travel

**WILLIAM N.** | Export Controls Form  
 \$0.00 — Travel

**WILLIAM N.** | 8/19 Demo  
 \$506.67 — Expense

04

Available Expenses →

07/09 **Office Warehouse**  
 \$68.23

07/09 **Cafe Monte**  
 \$45.76

07/09 **American Airlines**  
 \$156.20

01/21 **American Airlines**  
 \$168.20

01

Open Reports →

04/03 **Bank test**  
 \$113.99

### MY TRIPS (0)

You currently have no upcoming trips.